INDEPENDENT SECTOR

The Pursuit of Influence

INTERVIEWS WITH NONPROFIT LEADERS ABOUT ADVOCACY

AUTHORS:

Dr. Heather MacIndoe
Dr. Mirae Kim
Dr. Lewis Faulk
Claire Connacher, MPP

PUBLICATION DATE:
October 2024

2022
PUBLIC ENGAGEMENT
NONPROFIT SURVEY

UMass
Boston

SCHAR SCHOOL OF POLICY
AND GOVERNMENT
George Mason University

SCHOOL of
PUBLIC AFFAIRS

Authors & Acknowledgements

Title:

The Pursuit of Influence: Interviews with Nonprofit Leaders About Advocacy

Authors:

Heather MacIndoe,[1] Mirae Kim,[2] Lewis Faulk,[3] Claire Connacher[4]

Authors' Affiliations:

[1]Heather MacIndoe is an associate professor in the Department of Public Policy and Public Affairs in the McCormack Graduate School of Policy and Global Studies at the University of Massachusetts Boston.

[2]Mirae Kim is an associate professor and M.P.A. program director in the Schar School of Policy and Government at George Mason University.

[3]Lewis Faulk is an associate professor in the Department of Public Administration and Policy in the School of Public Affairs at American University

[4]Claire Connacher is a doctoral candidate in the Department of Public Policy and Public Affairs in the McCormack Graduate School of Policy and Global Studies at the University of Massachusetts Boston.

Preferred Citation:

MacIndoe, H., Kim, M., Faulk, L., & Connacher, C. (2024). *The Pursuit of Influence: Interviews with Nonprofit Leaders About Advocacy.* Independent Sector. **https://independentsector.org/resource/the-pursuit-of-influence/**

Table of Contents

Dear Colleagues,

In 2023, Independent Sector released "**The Retreat of Influence**," the first nationally representative survey of nonprofit advocacy in over 20 years. The report found that only 31% of nonprofits today have engaged in advocacy and/or lobbying, a significant drop from 2000.

The nonprofit sector's critical work – providing human services, bolstering civil society, and strengthening communities – is tied directly to public policy and issue engagement. Our sector lifts up the voices and helps meet the needs of the individuals and communities facing the greatest challenges. We organize to close gaps and break down barriers. We work to build a nation where all people thrive and democracy flourishes. Without the voices of advocates, the changes we seek become much harder, if not impossible, to achieve.

This 2024 report is the qualitative counterpart to last year's survey. It offers an in-depth look at the perspectives of 40 nonprofit leaders representing a cross-section of the charitable sector, with interviews designed to complement last year's quantitative findings. In short, this report seeks to uncover what's beneath the numbers, and to help us better understand the dynamics of advocacy in our sector.

I'm eager to share these findings at a moment when the polarization in our society is extreme, and when many look to the nonprofit sector to bridge divides. This research is part of Independent Sector's broader strategy to provide not only knowledge but also tools and interventions to build the capacity of organizations and the sector to advance the greater good. We believe this report will strengthen that work and support our sector's essential missions.

I encourage you to get involved in the policy process and issue engagement – as individuals, leaders, and community members. We know that advocacy takes time, expertise, and resources, but that there is also a great deal to gain. Our aim with this research is to equip individuals and organizations with the tools, trainings, and resources needed to be informed and effective advocates.

The changes we seek in the world don't just happen. They take not only passion, but also strategic and well-informed advocacy efforts. Let's make sure our advocates have what they need to get the job done.

Akilah Watkins

Dr. Akilah Watkins
President and CEO
Independent Sector

Executive Summary

How do nonprofits define advocacy?

1. For nonprofit leaders, the meaning of advocacy encompasses many aspects of their work, including some that may be inaccurately defined.
2. Advocacy is often mission-based and selective.
3. Advocacy is using your voice and giving a voice to others.
4. Advocacy is accomplished through relationships and coalitions.

What are the greatest barriers to nonprofit engagement in advocacy or policy conversations? How do nonprofits work to overcome them?

1. Lack of resources and capacity are the main barriers to nonprofit engagement in advocacy.
2. Lack of expertise and an understanding of the rules are also persistent barriers.
3. Government inaction and unresponsiveness stymies nonprofit voice in the system.
4. Coalitions can help nonprofits overcome some capacity and expertise barriers.
5. Board support is an important way to overcome advocacy barriers.

Do nonprofits think the government generally supports their missions? How so?

1. Nonprofits associate government support with funding.
2. Nonprofits value policy support from government.
3. Nonprofits want a seat at the table.
4. Building relationships with government is crucial.

How do issues of diversity, equity, and inclusion matter for nonprofit advocacy work?

1. In order to advocate for community-specific needs, nonprofit organizations strive for governance that reflects community diversity.
2. Advocacy initiatives are more effective when they thoroughly reflect the diverse needs of the community.
3. Empowerment through representation is crucial to ensure marginalized and underserved groups' perspectives are included in policy discussions.
4. Nonprofits face challenges integrating diversity, equity, and inclusion (DEI) into their advocacy efforts.

How does the current partisan state of American politics in 2024 affect nonprofits?

1. Maintaining a bipartisan or nonpartisan stance is a strategic necessity.
2. Nonprofits must carefully navigate policy engagement.
3. Political dynamics create unpredictability for nonprofits, affecting their operational capabilities.
4. The increasingly polarized landscape of American politics may distract nonprofits from their core missions.

Introduction

The Many Roles of U.S. Nonprofits

The United States nonprofit sector fulfills many roles. Nonprofit organizations in the U.S. are an essential component of the contemporary welfare state, providing important programs and services to millions of Americans. These efforts are often supported by government grants and contracts. Charitable nonprofits benefit from tax exemption under section 501(c)(3) of the Internal Revenue Code, which also allows them to receive tax-deductible contributions. The scope of these nonprofits is very wide: They feed the hungry, offer shelter, bring the arts to school children, provide family services, care for animals, protect the environment, deliver mental health services, respond to man-made and natural emergencies, offer workforce development, run youth sports leagues, provide legal services to immigrants, and much more.

According to Independent Sector's recent "**Health of the U.S. Nonprofit Sector: Annual Review**" (November 2023), the nonprofit sector is an economic engine. In 2022, nonprofits contributed $1.4 trillion to the U.S. economy, which is 5.6% of the GDP. The sector also employs almost 7% of the workforce. According to a new U.S. Census report, nonprofits are the site of significant civic activity, with an estimated 60.7 million (23.2%) adults volunteering in 2021 (Schneider & Marshall, 2023). The economic value of this volunteer work is estimated at $123 billion.

Nonprofit organizations also play a fundamental role in American democracy, particularly through policy advocacy and lobbying. These organizations amplify the voices of marginalized populations who may be underserved by the political system. Additionally, nonprofits advocate for equitable policies that benefit both their constituents and the sector overall. As part of their advocacy efforts, nonprofits engage in nonpartisan voter education and registration activities. Nonprofits can also lobby, directly appealing to public officials about legislation that affects their service recipients or mobilize the public to advocate for the issues that matter to them.

A New Benchmark on Nonprofit Advocacy: Public Engagement Nonprofit Survey (PENS)

In July 2023, Independent Sector published "**The Retreat of Influence: Exploring the Decline of Nonprofit Advocacy and Public Engagement**," which detailed the results of the first nationally representative survey of U.S. nonprofit public engagement in two decades (Faulk et al., 2023). PENS asked leaders of 501(c)(3) charitable nonprofits about a range of issues, such as advocacy and lobbying participation, barriers to advocacy, diversity, equity, and inclusion (DEI) policies, and contact with public officials. The PENS report found a notable decline in nonprofit participation in advocacy and lobbying compared to when the last national survey on the topic was conducted in the early 2000s. The 2022 PENS project found that only 31% of nonprofits reported engaging in advocacy or lobbying over the prior five years, and only 25% reported ever lobbying.

This reflects lower levels of policy participation in the sector compared to the Strengthening Nonprofit Advocacy Project (SNAP) conducted in 2000, which found that 74% of nonprofits reported ever having lobbied (Bass et al., 2007).

The decline in nonprofit advocacy and lobbying documented by the 2022 PENS project was accompanied by persistent misunderstanding of the legal rules affecting 501(c)(3) advocacy and lobbying. For example, in the SNAP study, over half of 501(c)(3) public charities (54%) knew they could support or oppose federal legislation in the year 2000, compared to fewer than one-third (32%) of nonprofits that are aware of that fact in 2022. While the PENS project provided important new quantitative benchmarks for U.S. nonprofit advocacy and uncovered important relationships between policy engagement and other organizational characteristics, such as having effective DEI strategies, there is still more to learn.

PENS Project Qualitative Interviews: Incorporating Nonprofit Voices

This report summarizes the findings from the second phase of the PENS study: 40 follow-up interviews with nonprofit leaders who completed the survey. Through these interviews, the research team sought to contextualize the PENS project findings by using the voices, examples, and stories of nonprofit leaders. This report summarizes the results of the PENS qualitative interviews and is organized around five research questions:

- **How do nonprofits define advocacy?**
- **What are the greatest barriers to nonprofit engagement in advocacy and policy conversations? How do nonprofits work to overcome them?**
- **Do nonprofits think the government generally supports their missions? How so?**
- **How do diversity, equity, and inclusion issues matter for nonprofit advocacy work?**
- **How does the current partisan state of American politics in 2024 affect nonprofits?**

The next section summarizes academic literature that speaks to the orienting questions of the report. This is followed by a description of the project methodology. The analytic findings are then organized according to our research questions.

Literature Review

Researcher Definitions of Policy Advocacy

In the academic literature, "advocacy" has generally been defined as some attempt to influence public policy, either through direct contact with government officials or indirectly through attempts to influence the public (Andrews & Edwards, 2004; Boris & Mosher-Williams, 1998; Berry & Arons, 2003; Reid, 1999; Schmid et al., 2008). In this sense, advocacy is a broad term that includes many forms of public engagement and education, including more strictly defined lobbying activities, which are generally the subject of formal regulation. For example, the Internal Revenue Service (IRS) focuses its regulation of 501(c)(3) policy activities on lobbying, which it defines as "attempting to influence legislation" (Internal Revenue Service, 2024a):

> **"...an organization will be regarded as attempting to influence legislation if it contacts, or urges the public to contact, members or employees of a legislative body for the purpose of proposing, supporting, or opposing legislation, or if the organization advocates the adoption or rejection of legislation."**

Based on IRS guidelines, scholars differentiate between direct lobbying, which involves interactions with legislators or other government officials involved in the legislative process, and grassroots lobbying, which seeks to influence public opinion or actions related to legislation (Prentice, 2016; Grasse et al., 2021). These definitions, however, may not align with how nonprofit stakeholders perceive their on-the-ground advocacy work.

Boris and Mosher-Williams (1998) proposed a broader definition of advocacy for nonprofits, encompassing various forms of civic engagement. This includes promoting political participation and interacting with government officials to educate them on issues without necessarily advocating for specific legislative outcomes.

Nonprofit Definitions of Advocacy

To understand nonprofits' advocacy activity, it is important to know how nonprofit leaders define advocacy. There has been minimal research that directly asks nonprofit leaders their definitions of policy advocacy or the activities they consider to be part of it. Berry and Arons (2003) conducted a survey experiment with nonprofit leaders of human service organizations. They varied the terminology in their questionnaire, asking one group, "How often does your organization undertake an effort to educate government officials at any level?" Meanwhile, other groups were asked the same question but with the words "lobby" or "advocate"

replacing "educate." They found that respondents given the "lobby" version were much less likely to report frequent contact with public officials, suggesting that nonprofits engaged in more general advocacy activities to a greater extent than lobbying, or at least that they were more comfortable saying so.

Other research has more directly explored how nonprofit organizations define their own advocacy. For example, Onyx et al. (2010) surveyed nonprofit executive leaders in Australia about what activities they considered advocacy. The findings revealed that participants identified not only traditional advocacy behaviors such as electoral activities, lobbying, and providing information to officials but also "sector coordination" activities like meetings with other service providers, which they believed strengthened advocacy capacity. Interestingly, respondents were hesitant to label their own activities as advocacy due to the political connotations of the word.

Similarly, Mosley (2013) interviewed leaders of nonprofits serving unhoused people in Chicago, Illinois, and found that many viewed broader public engagement activities as advocacy, including community outreach and collaborations with other service providers. Some even considered direct service provision as part of their advocacy efforts (Chin, 2018; Mosley, 2013). Despite initially stating that their organizations did not engage in policy advocacy, some participants in Mosley's 2013 study later described participating in activities typically classified as advocacy, such as meeting with public officials and engaging in advocacy coalitions. Similar to the findings in Onyx et al. (2010), Mosley (2013) found that participants often did not perceive these activities as being "political" (p. 80), highlighting a common discrepancy in how advocacy is recognized and described by practitioners in the nonprofit sector.

Barriers to Nonprofit Engagement in Advocacy/Lobbying

A primary reason why nonprofits may not engage in policy advocacy is its perceived lack of relevance to their central mission activities (Beaton et al., 2021). If advocacy is not part of the mission statement, nonprofits are less likely to pursue it (Donaldson, 2007; Guo & Zhang, 2014; Pekkanen & Smith, 2014). Conversely, research indicates that nonprofits serving specialized populations identified in their mission statements, such as immigrants or children in the welfare system, are more likely to engage in advocacy (MacIndoe & Whalen, 2013; Mosley & Ros, 2011; Smith et al., 2017; Suárez & Hwang, 2008).

However, even nonprofits that actively engage in advocacy face barriers to their engagement. A commonly cited barrier to nonprofit advocacy is the lack of organizational capacity to engage in advocacy over and above organizations' primary mission activities (Beaton et al., 2021). Insufficient resources, including funding, time, and staff expertise, can prevent nonprofits from engaging in advocacy (Boris et al., 2014; Child & Grønbjerg, 2007; Donaldson, 2007; Fyall & Allard, 2017; Nicholson-Crotty, 2009; Pekkanen & Smith, 2014; Schmid et al., 2008). Additionally, the capacity to engage in advocacy is influenced by professionalism, policy knowledge, and collaborative experience (Child & Grønbjerg, 2007; Donaldson, 2007; Leroux & Goerdel, 2009; MacIndoe & Whalen, 2013; Mosley, 2010; Nicholson-Crotty, 2009).

Another significant barrier is confusion and fear about the government rules on reporting public policy-related activities. The vague wording of section 501(c)(3) of the Internal Revenue Code, which restricts lobbying by stating that tax-exempt status is at risk if "a substantial part of its activities is attempting to influence legislation (commonly known as lobbying)" (Internal Revenue Service, 2024a) has led to nonprofit leaders being uncertain about allowable advocacy efforts and spending (Berry & Arons, 2003). Importantly, this confusion has persisted despite a 1976 amendment under section 501(h) clarifying allowable spending percentages on direct and grassroots lobbying based on a 501(c)(3) organization's budget size (Internal Revenue Service, 2024b).

Boris et al. (2014) observed that nonprofits deterred by the complexities of government were less likely to engage in advocacy. Similarly, Mellinger (2014) found that human service organizations with a clear understanding of lobbying were more inclined to advocate. Specifically, those choosing to operate under the 501(h) standard were more likely to pursue advocacy activities (Calderon et al., 2021; MacIndoe & Whalen, 2013). This suggests that fears and misconceptions about regulatory compliance are important barriers that hinder nonprofits from effectively advocating for issues important to their constituents and their organizations.

Nonprofit Advocacy and Perceptions of Government Support for Nonprofits

Research on how nonprofits perceive government support for their mission is limited. However, a recent study by Noor et al. (2022) explored the trust Muslim leaders of Muslim-American nonprofits held toward local, state, and federal governments during the distribution of CARES Act funding in 2020. They found that about 64% of respondents believed the government was likely to discriminate against them, with similar levels of distrust across all government levels. They also found that trust in the state government varied by the state's party affiliation, with Muslim nonprofit leaders in Republican states exhibiting less trust.

Other studies have investigated the broader policy environment's impact on nonprofit advocacy. A case study of charter schools from Holyoke et al. (2007) found that nonprofits tended to lobby more in jurisdictions they perceived as ideologically aligned with their stance and where they believed the government was likely to fund public programs. In their survey study of Massachusetts nonprofits, MacIndoe and Beaton (2019) found that nonprofits were less likely to engage in policy advocacy if they perceived the political environment as either very receptive or very unreceptive to their issues. That is, if the political environment was too open to nonprofit policy positions, nonprofits would not be motivated to put in the effort to mobilize – but nonprofits would also not engage if they thought they had no chance of convincing policymakers (MacIndoe & Beaton, 2019). The authors suggested nonprofits are more motivated to advocate in moderately open environments. Riegel and Mumford (2022) also discovered that changes to how government operated during the COVID-19 pandemic, which created a hostile policy environment, deterred advocacy by nonprofits.

Research shows that nonprofits' perceptions of government influence their advocacy efforts. Holyoke et al. (2007) reported that nonprofit organizations were more likely to advocate if they thought they had allies within government. Likewise, Guo and Zhang (2014) found that anticipated policy benefits spurred nonprofits to advocate. Li et al. (2017) found that under authoritarian governments, uncertainty about government actions hampered advocacy. Other research emphasizes the importance of maintaining friendly relationships with government to facilitate advocacy (Fyall & McGuire, 2015; Nyland, 1995; Onyx et al., 2010). Nyland (1995) and Fyall and McGuire (2015) provided evidence that cooperative networks between government officials and nonprofits engaged in policy were beneficial to shared government–nonprofit interests.

The interplay between nonprofit advocacy and government funding merits close examination. Research indicates that nonprofits engaged in advocacy often view the government as a collaborative partner (Clear et al., 2018; Fyall & McGuire, 2015; Mosley, 2012; Nyland, 1995; Onyx et al., 2010). Those holding government contracts typically refrain from adopting adversarial stances or controversial advocacy methods and instead maintain close, cooperative relationships with government officials to secure ongoing contracts

(Clear et al., 2018; Mosley, 2012). Mosley (2012) noted that nonprofits reliant on government funding reported that officials seemed responsive to their needs. Conversely, organizations without government funding were found to be less likely to maintain amicable relations with government and more likely to assume adversarial positions (Clear et al., 2018; Mosley, 2012).

Nonprofits, DEI, and Advocacy

In the nonprofit sector, diversity often refers to ensuring that the identities of staff, executive leadership, and board members reflect those of the community served (Weisinger et al., 2016). This concept is sometimes called representation (Gazley et al., 2010) or descriptive representation (Guo & Musso, 2007; Kim & Mason, 2018). A prevalent justification for diversity is the "business case," which posits that heterogeneous groups are more effective, make superior decisions, and excel at problem-solving (Gazley et al., 2010; Glass, 2022; Weisinger et al., 2016). Additionally, the "social justice case" for diversity emphasizes valuing diversity not just for employment purposes but as a means to address historical injustices (Glass, 2022; Weisinger et al., 2016). Within nonprofits, descriptive representation is thought to enhance the organization's capacity to genuinely represent and advocate for the needs of those they serve (Guo & Musso, 2007; Kim & Mason, 2018).

Much of the literature on DEI in nonprofits emphasizes the diversity of identities among an organization's constituents, staff, and leadership. Some studies specifically explore nonprofits serving people of color, defined as racial or ethnic groups other than non-Hispanic whites (Kim & Li, 2023, p. 1146). This body of research often discusses the functions of these organizations and the communities they support (Gleeson & Bloemraad, 2013; Hung, 2007; Patraporn et al., 2010; Roth et al., 2015; Vu et al., 2017). It highlights the unique value these nonprofits provide, such as delivering culturally competent social services, creating communal spaces, and aiding groups in addressing specific challenges (Patraporn et al., 2010; Roth et al., 2015; Vu et al., 2017). Additionally, Kim and Li (2023) noted that nonprofits serving people of color frequently face greater financial difficulties compared to other organizations, often due to limited access to donation networks.

Other research explores diversity within nonprofit boards of directors. Studies show that boards with policies explicitly designed to institutionalize diversity are more likely to achieve it (Bradshaw & Fredette, 2013). Several studies have associated greater diversity in terms of gender, race, or ethnicity on nonprofit boards with improved organizational performance (Brown, 2002; Harris, 2014; Mumford, 2022). However, some research suggests that, to reap the benefits of diversity, nonprofit boards may need to navigate initial organizational conflicts (Fredette & Bernstein, 2019). Additionally, the effectiveness of diverse boards may depend on their alignment with other organizational strategies and structures (Gazley et al., 2010).

A significant theme in nonprofit advocacy literature is the role of nonprofits in enhancing political representation for their constituents, particularly marginalized communities.

Boosting political representation is a key objective of policy advocacy for some organizations. An essential argument regarding the value of nonprofits in U.S. society is their ability and commitment to advocate for politically marginalized groups that have limited access to the policy process (Berry & Arons, 2003; Strolovitch, 2006). Guo and Musso (2007) proposed a conceptual framework for nonprofit representation of their constituents that incorporates five dimensions: substantive and symbolic representation, which relate to the legitimacy of the organization to represent its constituents, and formal, descriptive, and participatory representation, which pertain to the organization's capacity to effectively do so.

Diversity and representation are closely linked to the advocacy activities of nonprofits. Research has shown a correlation between the identity of constituents and descriptive representation among nonprofit staff, executive leadership, and boards, leading to enhanced policy advocacy efforts (Guo & Saxton, 2010; Kim & Mason, 2018; Mumford, 2022). However, the impact of this relationship may vary depending on the political and policy context. Zhang and Guo (2012, 2021) discovered that this connection might not hold in authoritarian political environments, indicating that external political factors can mediate the effectiveness of diversity and representation in advocacy activities.

Research has also explored the role of nonprofits in enhancing access to various facets of public life. For example, studies have demonstrated that nonprofits can boost constituent access to government services (Cheng et al., 2022), foster political participation among their constituents (LeRoux, 2007), and augment the representation of specific identity groups in elected office (Reckhow, 2009). Additionally, in their study of Michigan nonprofits, LeRoux and Goerdel (2009) found that descriptive representation in nonprofit leadership significantly enhances an organization's capacity to improve access to government systems.

Nonprofit Advocacy and Partisan American Politics

Despite the increasingly partisan nature of American politics, little research has focused on how this affects nonprofit advocacy. Importantly, growth in partisanship has coincided with growing interdependence between governments and nonprofits through the devolution of government services to nonprofit organizations. This has led to greater government reliance on nonprofits for service provision and, conversely, increased nonprofit dependence on government funding (Alexander et al., 1999; Marwell, 2004). A few studies suggest that increased partisanship may strain nonprofit–government relationships. Fyall and McGuire (2015) noted that some nonprofit leaders they interviewed expressed concerns about advocacy prospects due to the polarized political climate in the U.S. Additionally, other research indicates that nonprofit leaders sometimes avoid labeling their activities as advocacy because they perceive the term as overtly political and try to distance themselves from political associations (Berry, 2005; Onyx et al., 2010; Mosley, 2014).

Research has also identified certain political conditions that may enhance the likelihood of nonprofit advocacy. For instance, nonprofits may be particularly active in advocacy when they face unfriendly policies or when they perceive the political environment as favorable and have allies in government(Holyoke et al., 2007; MacIndoe & Beaton, 2019; Nicholson-Crotty, 2007, 2011). Holyoke et al. (2007) found that ideological support among the electorate in a nonprofit's target area affects the likelihood of its lobbying efforts. Mason (2015) explored how the political ideology of nonprofit leaders in California influences their organizations' advocacy engagement, discovering that more conservative leaders were less likely to engage in advocacy but more likely to employ both insider and outsider tactics. This suggests that conservative leaders, especially in a liberal state like California, may feel the need to rely more on these tactics (Mason, 2015).

Nonprofit advocacy and partisanship have been analyzed within the context of specific politically sensitive issues. For instance, Calderon, Chand, and Hawes (2021) conducted a national study of immigrant service organizations and discovered that these groups were highly active in advocacy, targeting a variety of entities including immigration agencies. In contrast, Smith et al. (2017) studied nonprofit activity following the implementation of restrictive immigration laws in Alabama and found lower levels of engagement. However, organizations led by individuals with positive views on immigration, or those offering services in multiple languages, were more likely to participate in advocacy.

Research has also investigated how the political environment and the specific targets of advocacy – whether local, state, or federal – impact nonprofit activities. Nicholson-Crotty (2011) found that reproductive health nonprofits facing hostile state legislatures often shifted their efforts to bureaucratic lobbying. Nonprofits' sources of funding can also influence the targets of advocacy (Buffardi et al., 2015; Leech, 2006; Mellinger & Kolomer, 2013). For example, nonprofits receiving federal funds are more inclined to advocate at the federal level (Leech, 2006). Geographic location plays a role too: Devita et al. (2014) observed that nonprofits based in Washington, D.C., were more likely to lobby the federal government than those in Maryland or Virginia.

Methodology

A team of four researchers completed 40 semi-structured qualitative interviews between January and May 2024. Potential interviewees were identified in the 2022 PENS project from nonprofit leaders who responded "yes" to a survey question asking whether they would be willing to be contacted for a follow-up interview. Like the survey, the interviews were conducted with 501(c)(3) charitable nonprofits. However, the interviews focused exclusively on nonprofit leaders of human service organizations, the largest subsector in the survey (36.4%). Six initial cognitive interviews were conducted with nonprofit leaders in Massachusetts and Washington, D.C., to test the interview protocol. The interview protocol was revised based on these interviews and conversations with academic and practitioner colleagues. The study then received approval from the Institutional Review Boards at the University of Massachusetts Boston, George Mason University, and American University.

Case Selection

The qualitative interview sample was a purposive sample from among human service organization respondents to the PENS study who indicated a willingness to take part in a follow-up interview. In selecting which survey respondents to contact, we adopted an approach from qualitative sociology described by Jan Trost in her 1986 article, "Statistically nonrepresentative stratified sampling: A sampling technique for qualitative studies." Trost advises sampling across areas of theoretical interest to the study. For our purposes, we selected four characteristics of nonprofits along which we might expect interviewee responses about nonprofit advocacy to vary. These include a nonprofit's five-year advocacy trend (as specified by survey respondents), organizational size (expenses), organizational age (years since IRS rule date establishing tax exemption), and the policy environment (whether a nonprofit was in a red, blue, or purple state). We intentionally focused on nonprofit organizational characteristics since executive directors acted as organizational informants by describing how their organizations engaged in advocacy.

As Trost (1986) notes, this is a "statistically non-representative" sample. We are not attempting to achieve a representative sample of nonprofits. This is not the goal of qualitative research. Rather, this is a *theoretical* approach to sampling that attempts to focus on the most important variation existing in the sample of potential cases that are linked to the phenomenon of interest. See Table 1 for an illustration of the juxtaposition of the four nonprofit characteristics. Interviewing across all configurations of these factors would result in 36 interviews (the bottom row of the table). When looking at the PENS data, thirty-four cells in Table 1 described nonprofit survey respondents (there were two empty cells). Twenty-four of these cells contained four or more possible interview cases. We conducted 40 interviews and were able to interview across 70% of the total cells in Table 1 and 100% of the cells with four or more possible respondents. This means that, to the extent possible as described by this approach, our interview sample should encompass much of the theoretical variation of interest across nonprofit organizations.

TABLE 1: STATISTICALLY NONREPRESENTATIVE STRATIFIED SAMPLE OF NONPROFIT CASES

Advocacy Trend	Advocacy Stayed the Same																		Advocacy Changed																	
Organization Size	Small <$100K						Medium $100-$999K						Large $1M+						Small <$100K						Medium $100-$999K						Large $1M+					
Organization Age	<M Age			>M Age			<M Age			>M Age			<M Age			>M Age			<M Age			>M Age			<M Age			>M Age			<M Age			>M Age		
Policy Environment	R	B	P	R	B	P	R	B	P	R	B	P	R	B	P	R	B	P	R	B	P	R	B	P	R	B	P	R	B	P	R	B	P	R	B	P

Interview Administration

Potential interview respondents were initially contacted via an email describing the study and inviting them to participate in a one-hour interview over Zoom, an online video conferencing platform. Following the COVID-19 pandemic and an increase in remote work, most U.S. professionals are familiar with Zoom or a similar form of online communication. Further, academic research has confirmed the value and validity of data collected via digital interviews (Howlett, 2022; Lindsay, 2022; Oliffe et al., 2021; Żadkowska et al., 2022).

Table 2 provides information on participant characteristics, and Table 3 provides information on the nonprofit cases. Most nonprofit leaders (63%) we interviewed were female. About 33% were people of color. Executive directors had been in their positions an average of about 12 years, with an average of about 20 years of tenure in the nonprofit sector. Three-quarters of the organizations' annual budgets were below $1 million: 20% were below $100,000 and 55% were between $100,000 and $999,999. The remaining quarter had budgets larger than $1 million. As shown in Table 2, interviewees represented a variety of organizations across age and geographic context. Forty-eight percent of organizations were located in states that were favored to vote Democratic in the 2020 presidential election (i.e., "blue states"), with another 38% located in battleground ("purple") states and 15% in "red" states. Red, blue, and purple state designations were determined using the Cook Political Report 2020 Electoral College Ratings (**https://www.cookpolitical.com**).

Interviews were scheduled at a time convenient for the nonprofit leaders, with a Zoom link emailed to them. Interviewees were nonprofit executive directors, CEOs, or equivalent leaders, and were offered an interview incentive of a $100 Amazon gift card, which was provided on completion of each interview. The conversations averaged 53 minutes in length and ranged from 37 minutes to 1 hour and 56 minutes. Memos were written immediately following each interview to record and summarize the interviewer's thoughts and reactions to the conversation. All interviews were professionally transcribed. Interviews were coded using NVivo qualitative data analysis software. Each interview was coded by two researchers. Table 3 provides information on the nonprofit organizations interviewed.

The interviewers asked a range of questions tied to five core research questions:

1. **How do nonprofits define advocacy?**

2. **What are the greatest barriers to nonprofit engagement in advocacy or policy conversations? How do nonprofits work to overcome them?**

3. **Do nonprofits think the government generally supports their missions? How so?**

4. **How do issues of diversity, equity, and inclusion matter for nonprofit advocacy work?**

5. **How does the current partisan state of American politics in 2024 affect nonprofit organizations?**

In each section of the following analysis, we describe our main findings for each of these research questions, and we include quotes from the interviewees that reflect and inform those findings.

TABLE 2: DESCRIPTION OF PARTICIPANT CHARACTERISTICS

Gender		
Female	25	(62.5%)
Male	15	(37.5%)

Person of Color		
Yes	13	(32.5%)
No	27	(67.5%)

Time at Nonprofit (Years)	
Average	11.7
Minimum	2.0
Maximum	30.0

Duration in Nonprofit Sector (Years)	
Average	20.0
Minimum	5.0
Maximum	45.0

TABLE 3: DESCRIPTION OF NONPROFIT CASES

Advocacy Trend in the Last 5 Years		
Stayed the Same	19	(47.5%)
Changed	21	(52.5%)

Organizational Size		
Small (<$100K)	8	(20.0%)
Medium ($100-$999K)	22	(55.0%)
Large $1M+	10	(25.0%)

Organizational Age (Median: 17 Years)		
Above Median	18	(45.0%)
Below Median	22	(55.0%)

Policy Environment		
Red State	6	(15.0%)
Blue State	19	(47.5%)
Purple State	15	(37.5%)

Region		
Northeast	4	(10.0%)
Midwest	9	(22.5%)
South	15	(37.5%)
West	12	(30.0%)

Analytic Findings

This report summarizes findings from conversations with leaders from 40 nonprofits that participated in the PENS project. These nonprofits span the breadth of the human services sector, including such diverse organizations as debating clubs, food pantries, cycling coalitions, emergency housing programs, immigrant legal services, centers for people with disabilities, organizations to support women and girls, mental health and substance abuse nonprofits, veterans service organizations, and foster care support organizations.

Since the parameters of research are often set by researcher definitions, we begin the discussion of our findings with an exploration of how nonprofit leaders themselves define advocacy. To what extent do nonprofits' definitions mirror research definitions? What are key themes that executive directors raise as they talk about their organizations' advocacy and lobbying? How do leaders' definitions seem to shape their public engagement, including policy engagement?

This leads us to a consideration of the barriers that keep nonprofits from engaging in advocacy. What are frequently mentioned hurdles to advocacy and lobbying? Are there strategies that nonprofits use to overcome obstacles to advocacy?

One barrier to nonprofit advocacy engagement may be how nonprofits perceive governments' views of their organizations. Given the importance of government support to the human services sector, we focus particularly on this potential hurdle. Do nonprofits think that the government generally supports their missions? If so, how?

DEI issues are important to nonprofit work, shaping various aspects of nonprofit activity, including advocacy. DEI is also conceptually linked to issues of representation in the policy process. So we explored how DEI issues matter for nonprofit advocacy work. What are the ways that DEI is or is not incorporated into advocacy and lobbying?

Finally, in a U.S. presidential election year, and in the context of the increasingly contentious tone of politics in the last several years, we wondered how such political division impacts nonprofit organizations. We asked, how does the current partisan state of American politics in 2024 affect nonprofit organizations? The following sections consider findings from each research question in turn.
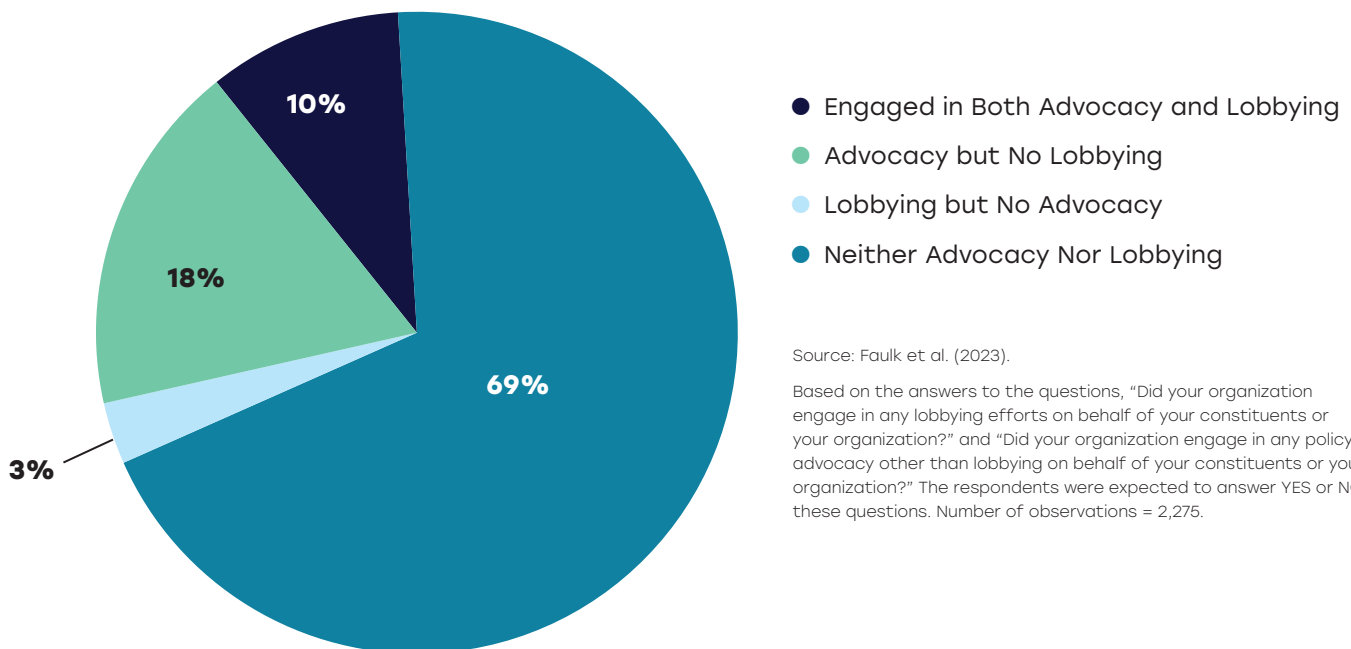
?

How do nonprofits define advocacy?

Studies of nonprofit advocacy usually rely on researcher definitions of advocacy. Such definitions usually differentiate between general issue advocacy and lobbying. For example, the 2022 PENS study provided the following definitions of advocacy and lobbying to survey respondents:

> **Lobbying** involves taking a position on specific legislation (local, state, or federal level) and communicating this position to legislators or their staff, either directly or indirectly.
>
> **Policy advocacy** involves attempting to influence government policy at the local, state, or federal level. This may include lobbying, but it also involves educational and information-sharing activities such as sponsoring events to raise public awareness of an issue, conducting research, educating the public about policies that affect your organization, or participating in coalitions.

Figure 1 shows nonprofit responses to survey questions that referenced these definitions. Only 31% of nonprofits reported engaging in advocacy or lobbying over the prior five years and only 25% reported ever lobbying, which is around a third of the percentage of nonprofits that reported ever having lobbied in 2000 (74%). This is a decline in participation as compared to the Strengthening Nonprofit Advocacy Project (SNAP) conducted two decades ago (Bass et al. 2007).

FIGURE 1: ADVOCACY AND LOBBYING IN THE PENS REPORT

- Engaged in Both Advocacy and Lobbying
- Advocacy but No Lobbying
- Lobbying but No Advocacy
- Neither Advocacy Nor Lobbying

Source: Faulk et al. (2023).

Based on the answers to the questions, "Did your organization engage in any lobbying efforts on behalf of your constituents or your organization?" and "Did your organization engage in any policy advocacy other than lobbying on behalf of your constituents or your organization?" The respondents were expected to answer YES or NO to these questions. Number of observations = 2,275.

Most scholarship on nonprofit advocacy relies on researcher definitions of advocacy and lobbying. However, we know relatively little about how *nonprofits themselves* define advocacy. To fill this gap, we look to conversations with nonprofit executive directors to learn their definitions. Discussions with nonprofit leaders revealed several general themes related to how these practitioners define and think about advocacy and lobbying. The themes are summarized here along with illustrative quotes. As in all findings in this report, we use pseudonyms instead of actual organizations' names.

1. For nonprofit leaders, the meaning of advocacy encompasses many aspects of their work, including some that may be inaccurately defined.

During the interviews, nonprofit managers demonstrated a mixed understanding of legal regulations about lobbying. Many nonprofit leaders seemed uncertain about the actions their organizations could legally take or made inaccurate statements such as "nonprofits can't lobby." A few executive directors stated that they did not do advocacy or lobbying but then proceeded to describe activities their nonprofits did that are advocacy or lobbying. Others incorrectly described what they are legally permitted to do and referenced needing to meet 501(c)(3) requirements as a reason for not engaging. For example, the executive director of the New Mexico Child and Family Service Nonprofit incorrectly described how a nonprofit alliance could not lobby:

> *"We are each our own 501(c)(3), but we work collectively as an alliance to advocate for whether it's when we go up for legislative funding, but we also can't really lobby because that goes against all of the requirements that we have to adhere to. And so, there's understanding the confines of the work where we can advocate, where we have to be a little more cautious is really important."*

When talking about advocacy, some nonprofit leaders included examples of advocacy and lobbying activities that fit researchers' definitions. However, some executive directors also used "advocacy" as an umbrella term to refer to a wide range of activities such as fundraising, community outreach, and public relations. Nonprofit leaders also frequently used the word "advocacy" in a colloquial manner, as in "advocating for our clients." A leader of the California Immigrant Legal Services Organization, a large nonprofit, summarizes this broad view of advocacy:

> *"For us, particularly what we think [advocacy] means is to be more vocal about the cause to support our clients, whatever that means. It could be social media, it could be op-eds. It could be a picketing day of protest, Immigrant Action Day, working with local legislatures to change laws. It could mean PR work. It could mean ... I mean, I don't know. There's no beginning and end to it. I mean, literally even fundraising events are a form of advocacy."*

The "broadness" of advocacy was echoed by many executive directors. The expansiveness of this definition also included descriptions of both advocacy activities and venue. For example, the leader of Southern Homeless Services said:

> *"Well, advocacy to me is a very broad topic. It can be everything from meeting with legislative members, both in a state level or on a federal level. Trying to provide them information that allows them to serve their constituencies down to the simple fact of just taking the time to pick up the phone and call a landlord and be able to give a personal character reference."*

It is worth noting that many nonprofit leaders spoke about intentionally using different terms such as "education," "raising awareness," and "influence" to describe advocacy work. The leader of the Midwest Organic Food Safeguard Organization described how she engages with her donors and other stakeholders around the issue of advocacy for better rules around organic food labeling:

> *"Oh, that's so tricky because I stumble around trying to find another word for advocacy all the time in my writing. Because no regular person wants to sit down and read a story that says, 'We advocate, our advocacy.' Nobody wants to hear those words. They want to hear more plain English, I think … hopefully, ideally, there's an education component."*

For many nonprofits, this search for synonyms was linked to organizations' understanding, or lack thereof, about rules around advocacy and lobbying. The executive director of the Northeast Women and Girls Nonprofit described her experience with trying to explain lobbying rules to other organizations:

> *"I often find myself teaching other nonprofits that it's okay to lobby, that they can lobby. Sometimes they find that a really … well, scary and distasteful word, so then we talk about influence."*

Similarly, the leader of the Women's Mental Health, Recovery, and Housing Nonprofit took pains to describe how her organization engaged in "influence":

> *"… we were never sitting in rooms writing the policy. We were literally saying, 'Here's what we see. Here's why. Here's some great fact sheets and white papers and research reports and policy documents.' And so, it was more like an influencing kind of advocacy, trying to influence decisions."*

This executive director emphasized the educational aspects of advocacy – providing research and policy documents to lawmakers – while taking great pains to say they were "not writing policy."

Overall, interviews showed that nonprofit leaders view advocacy as a multifaceted and expansive concept encompassing activities from fundraising and public relations to direct lobbying and community outreach. This broad perspective allows them to adapt their strategies to best support their missions and clients, demonstrating the fluidity and inclusiveness of advocacy in the nonprofit sector. By redefining and diversifying their approach to advocacy, these leaders effectively navigate the complexities of engaging with various stakeholders and regulatory environments.

2. Advocacy is often mission-based and selective.

While executive directors held very broad definitions of advocacy, and often preferred not to use the terms "advocacy" or "lobbying," almost all nonprofit leaders were emphatic in stating that their advocacy involvement should be guided by their charitable missions. The executive director of the Ohio Housing Organization was particularly eloquent about this idea, which was shared by many other leaders, saying that "[advocacy] is using your missions as a north star and being able to advocate for the people you actually serve." Linking advocacy to mission was a theme throughout our conversations with nonprofit leaders. For example, the leader of the Northeast Food Equity and Access Nonprofit talked about the centrality of mission-based advocacy to create change:

> *"I think it's essential that all nonprofits participate in advocacy because the purpose of their existence is to create lasting change, whether it's in hunger or homelessness, things like that, and you can't do that just by putting Band-Aids on the issue or having a program. You have to get involved with government, and government has to change policy to address those issues. So advocacy is definitely … there is a role for nonprofits to be involved, and it's almost a necessity for them to be involved if they're true to whatever their mission is."*

This leader argued that effective advocacy includes policy change, not simply piecemeal efforts to address the concerns of nonprofit constituents.

Using mission as a "north star" to guide nonprofit advocacy means that nonprofits must be selective concerning when, where, and why they engage in policy issues. Several nonprofit leaders described their selectivity about advocacy as "staying in our lane." By this, they meant focusing on advocacy opportunities where they had specific expertise and on-the-ground knowledge. A leader of the Ohio Housing Organization described this approach:

> *"[Advocacy is] using your mission as a vehicle and being able to support the folks you serve. So I'm really strict on us staying in our lane. There's been so many opportunities for folks or for us to jump into different sectors around. We like to be perfectionists at what we do. We want to be the experts at what we do."*

Nonprofits who spoke about staying in their lane described the need to balance opportunities and organizational expertise. The executive director of the California Child and Family Services Organization

described a situation in which another nonprofit that did not understand their mission invited her organization to join an event:

> *"We have many more opportunities to engage in advocacy than we're able to take part in. [For example] we have this pollution problem down in [redacted] Beach, and it has to do with international relations, honestly ... So I was like, 'A bit off target for us, but thanks for thinking of us.' We did something with the [Environmental Health Coalition] recently. And so, they just had us pegged as an environmental health group. And it's not entirely in our lane. So you try to wish them well and stick to our business."*

Several nonprofit leaders argued that filtering their advocacy through a mission lens helped to prevent mission drift. This leader of the Southeast Foster Care Support Organization typified this line of thought:

> *"But I will say that one of the challenges we have as an organization is we are in the crisis lane and it's very easy to do this mission drift that people talk about because the closer you get to child welfare issues, the more gaps that you see ... We've got to stay in our lane. There's other people that do that that we can partner with, but right now, this is where we are and we have to do what aligns with our mission."*

Staying in their lane often resulted in nonprofits focusing on local issues in their advocacy. Many nonprofit mangers spoke about using their advocacy to address problems directly impacting their constituents. The leader of the California Immigrant Legal Services Organization expressed this local concentration:

> *"And so, for us, our concept of advocacy is to reflect on what's going on in the world, but also to act, think locally as much as possible, where our organization is centered so that we can obtain the resources we need to be more successful and to be able to win more cases for our clients."*

Some nonprofit leaders argued that nonprofits need to engage in advocacy, specifically lobbying, to create "impact" beyond their organizations. The executive director of the Arizona Family Resource Center, who was nearing the end of his career, offered this more expansive view of advocacy as policy impact:

> *"My answer [about how I define advocacy] is going to be a little roundabout, but rather than giving you a dictionary definition, as I get to be later in my career here, I've come to realize that just because I get another contract for the organization, or just because we get another X thousand dollars, or serve another Y hundred people, it doesn't really move the needle. We don't really make impact. Impact comes from changing laws and policies and people in power. So advocacy is the process of lobbying and educating and promoting policies and practices that serve our mission. And obviously not endorsing but educating around identifying prospective leaders who will ensure that our mission can be manifested."*

The above quote illustrates how some nonprofit leaders believe advocacy should be mission-linked but focused on systemic change rather than immediate organizational needs like funding for services. Another executive director who saw the need for impact beyond his immediate mission was the leader of the West Coast Center for Individuals with Intellectual and Developmental Disabilities. He described how he went to his board of directors for permission to engage in legislative advocacy that makes sense in his "particular corridor":

> *"I had a discussion with my board really early on, which was basically, 'I know you want me to fundraise; that's great. I can't fundraise my way out of this hole that we have or this lack of investment we have in our community.' So I had a long discussion with them and [received their] consent … to give my energies towards more legislative advocacy work, so that is a big percentage of what I do. Now not every organization needs to do that, so it's not like I would say that this is something that everybody should do, but my particular corridor of space here in [this state], it makes the most sense to do that for this organization, and so I devote a lot of energy towards that."*

3. Advocacy is using your voice and giving a voice to others.

Most nonprofit executive directors associated advocacy with "giving voice" to the needs and concerns of their clients. This central interest in voice directed both involvement in advocacy and who participated. Nonprofit leaders often spoke about how the populations they served were disenfranchised, or otherwise excluded from participating in the policy process, because they did not have the resources or expertise to engage. The leader of the Arizona Food Assistance Nonprofit said organizations like hers could be "megaphones" for the issue of food insecurity:

> *"Well, I'm no expert, but I would say I would define advocacy within nonprofits as being a voice, trying to create a megaphone to highlight the issues of your clients, and what among those issues and needs are being met and not being met."*

Some nonprofits understood "advocacy as voice" to mean moving beyond raising awareness of an issue to engaging clients with advocacy, and particularly getting them face time with policymakers. The leader of Minnesota Family Service Nonprofit echoed most nonprofits' assessments that their organizations have both a role and an opportunity when it comes to amplifying the voices of clients:

> *"Nonprofits have a real opportunity to bring awareness to certain issues, and we have access to populations that often lack a voice, that are disenfranchised. And so, we have a role in kind of helping lift up those voices and helping them connect. I think specifically we have this opportunity to work with local, state, and federal government to help influence those policy decisions, and again, to bring those voices to bear."*

In addition to giving voice, many nonprofit leaders who maintained it was their responsibility to represent client interests also argued it was important to include clients in the advocacy process itself. The executive director of the California Child and Family Services Organization spoke to this perspective:

> *"The way that we talk about [advocacy] is we want to give voice to what our clients and community members tell us that they need. And we want to be present as content or subject matter experts in the rooms where policy decisions are being made. So we want the voice of lived experience [in the room], and then we want … subject matter expertise, obviously."*

An executive director of the Minnesota Family Services Nonprofit, which supports parenting and healthy families, took this one step further and spoke about how her organization provides training to their clients to prepare them to tell their stories to policymakers:

> *"We do some work with some parent leaders to help prepare them to tell their stories and to sit at some of those policy tables and to be influencers or to speak to the legislature."*

The importance of involving clients directly in the advocacy process was shared by many nonprofit leaders, and the intention to amplify their voices and empower them was central to their advocacy activities. They said that this approach not only enhances the authenticity and impact of their advocacy but also helps bridge the gap between marginalized communities and decision-makers. By facilitating direct client participation, nonprofits strive for more inclusive and responsive policy outcomes.

4. Advocacy is accomplished through relationships and coalitions.

One of the most common refrains from nonprofits was that advocacy fundamentally relies on building relationships. In stories shared in the interviews, relationships took many forms, from on-on-one connections between nonprofits and local community members, state legislators, or federal rule-makers, to coalitions of nonprofits working together on behalf of a common cause. The leader of the West Coast Center for Individuals with Intellectual and Developmental Disabilities emphasized advocacy relationships, saying that frequency of contact is important, and the information nonprofits have to offer is valuable. Moreover, he stressed the point that a nonprofit does not stand alone, it represents a network of people. He likened nonprofit advocacy to a "contact sport," evoking both connections between people and organizations and pressure to translate these relationships into concrete change:

> *"Maybe you're discovering advocacy is a contact sport; you need to make contact and you need to do it regularly. [Policymakers are] going to see and hear so many faces. The number one goal for me when I'm making contact with folks isn't necessarily getting something pushed across agenda-wise, it's to inform them that we have a network of people that can be resources for them about public policy issues of interest … The more contact you have, the better. The more familiarity you have, the better. The more that people feel like that when you're working with folks, that you have valuable information, the better, and the only way you do that is by building relationships."*

The executive director of the Texas Child and Family Services Nonprofit typified the perspective of many nonprofit leaders who gave examples of patiently developing relationships with government officials to further the work of their nonprofits:

> *"I think advocacy is both knowing your population, having your data, but most importantly is having some personal connections. And that's knowing your council member or a council staff person. Then you can get a meeting. Then you can have that one-on-one. Because I'd say that's probably been the most effective. I mean, we have a new council member. She started about two years ago. Did not know her before. And I decided to just give her stuff or work through her staff to let her know what we do. Because she knew us already, but I took it slow to develop a relationship. Because in all of advocacy work, it is about relationships. The data and the policy, all that matters. But if you don't have a relationship, it ain't going to happen."*

This same nonprofit leader compared their relationships to a "web of advocacy" that includes their clients and employees, nonprofit coalitions, and those they seek to influence. Most nonprofit leaders emphasized the power in numbers that comes from being part of a coalition. As the leader from the Northeast Women and Girls Nonprofit said:

> *"We work in coalition because it gives us access to many more voices in the community coming together in partnership to move something."*

Nonprofit leaders described coalitions as important relationships that give them access to information, funding, a space to share problems, and power in numbers. An executive director of a homeless shelter described an impactful local coalition:

> *"So locally at [our] county level … there's a group of probably eight or nine … and we call ourselves sister CEOs because we all happen to be women running nonprofits in different rooms. We're all either in [homeless children] and runaway youth, food insecurity, medical, pregnant teens, transitional apartments. If I get a call in two minutes knowing that Nonprofit A needs something, and I've got a freezer full of hams from Easter, I'm sending over six hams. So we all advocate and talk and work together."*

Other nonprofit leaders who shared policy wins from their involvement in statewide coalitions also focused on their mission areas. This statement by the leader of the Arizona Family Resource Center echoed the experiences of many nonprofits that reported coalition successes in advocacy and lobbying:

> *"We, being a coalition of nonprofits who have been trying to address poverty, decided that we needed to have a $15 minimum wage in [our city]. And so, we decided that we were going to create a voter initiative, which exists in the [state]. Voters can gather signatures and put a measure on the ballot. And so we decided that, rather than waiting forever for people to make change, wouldn't it be nice if the nonprofit sector led for a change? And with a couple of really visionary colleagues, we became part of the core group [of nonprofits], along with some other political advocates and unions, to gather the signatures and advance this initiative forward."*
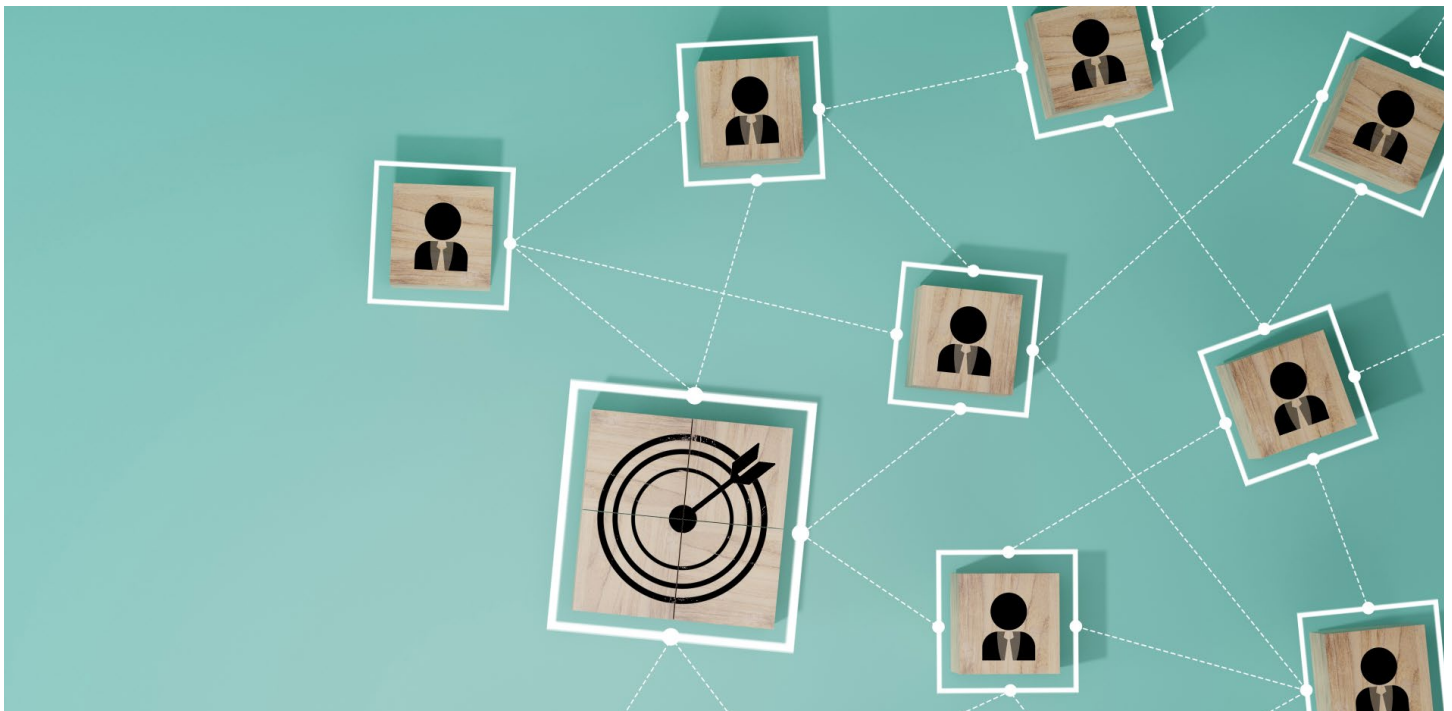
Conclusion

Most nonprofit respondents to the 2022 PENS project stated that they did not engage in advocacy and lobbying when it was defined in specific terms by researchers. In this sense, nonprofits in the broader sector seemed to agree with the leader of the Arkansas Homeless Services Nonprofit, who said:

> *"Well, for me, [advocacy has] not been my squeakiest wheel. When you're talking about meeting someone on the streets that has a child at night at 11 o'clock, and you're going to meet with them and trying to get them into a motel, somewhere so that they're safe, and so they can come in the next morning and do intake and things like this, those type of immediate human needs take so much priority."*

Nonprofit leaders expressed a broad definition of advocacy, encompassing activities not typically classified as such by researchers, including fundraising, community outreach, and public relations. The dominant description was "advocating for our clients." Some executive directors deliberately used different terms, such as education, raising awareness, and influence, to discuss advocacy with stakeholders, including funders.

Executive directors emphasized that nonprofit advocacy should be mission-based and selective, often described as "staying in their lane." This focus led nonprofits to engage primarily with local issues central to their mission. They avoided mission drift by filtering advocacy efforts through their core charitable objectives. Advocacy was also defined as needing to have an "impact," usually through lobbying for systemic changes that would benefit their constituents.

There was a mixed understanding of legal regulations around lobbying. Many nonprofits either incorrectly described lobbying or believed their organizations couldn't engage in it. They distinguished between "soft" and "hard" advocacy: soft advocacy involved raising awareness with passion and heart, while hard advocacy referred to lobbying aimed at changing policies for long-term benefits.

Advocacy was also seen as giving voice to constituents and empowering others to do the same. Many nonprofits viewed advocacy as a way to amplify the voices of disenfranchised clients. Some went further by training clients to engage directly with policymakers and participate in advocacy activities.

Finally, most executive directors argued that advocacy is best accomplished through relationships and coalitions. One leader described a "web of advocacy" to illustrate the various relationships nonprofits engage in for advocacy work. Nonprofit leaders also highlighted the importance of relationship-building, frequent contact, and providing valuable information or data to decision-makers.

? **Question 2:**
What are the greatest barriers to nonprofit engagement in advocacy or policy conversations? How do nonprofits work to overcome them?

Nonprofits face many barriers to their engagement in policy advocacy, lobbying, and other public engagement activities. As noted in the literature review, common discouraging factors include: (1) advocacy or policy work not being perceived as important to nonprofits' missions, (2) a lack of organizational capacity, including staff, time, funding, and expertise, (3) misunderstanding the laws and regulations affecting nonprofit advocacy and lobbying, and (4) real or perceived restrictions on advocacy from government funding agreements.

The 2022 PENS project examined how various factors might motivate or discourage advocacy. As shown in Figure 2, nonprofits most frequently cited their missions as a motivating factor for engaging in advocacy and lobbying. Positive values in the figure indicate a motivating factor, and negative values represent a discouraging factor. Two factors discussed in the literature – legal regulations and organizational capacity – were consistently seen as discouraging factors to advocacy.

FIGURE 2: MOTIVATING AND DISCOURAGING FACTORS FOR ADVOCACY FROM 2022 PENS PROJECT

● <$100,000 ● $100,000–$499,000 ● $500,000–$999,999 ● $1 Million–$9,999,999 ● $10 Million and Above
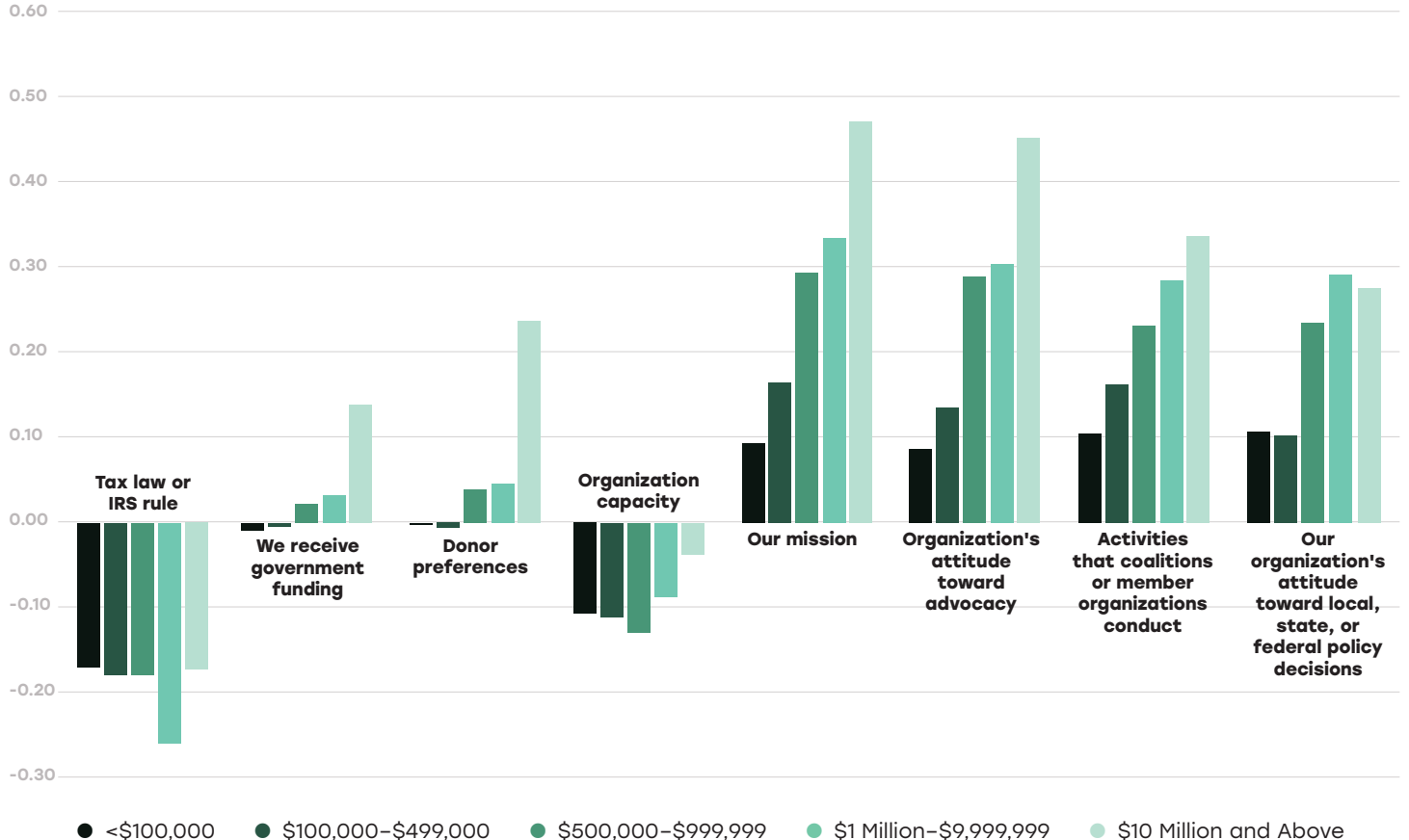
Source: Faulk et al. (2023).

Importantly, our qualitative findings supported the main findings of the 2022 PENS project regarding those prominent barriers to nonprofit advocacy. However, we were able to probe much deeper into the nuances of nonprofit organizations' barriers to advocacy engagement in our interviews.

1. Lack of resources and capacity are the main barriers to nonprofit engagement in advocacy.

Among the nonprofit leaders we spoke to, the most cited barrier to advocacy was lack of capacity. Executive directors spoke about lacking time and funding to engage in advocacy on top of their day-to-day direct services, fundraising, and other organizational activities. This was even true for organizations that engaged in advocacy activities. As one executive director of the California Youth-Focused Homeless Services Organization described:

> *"Having the time to focus on advocacy and public policy work is challenging ... In the past, before I took on this position, I handled a lot of that compliance and fundraising work, which freed the [then] executive director to do a little bit more of that public policy and advocacy work. And now that I've stepped into the role, I don't have that person doing the work that I used to do. Right now, we're reconfiguring job duties so that there's a little more room to do that. And I can see that our situation might be emblematic of a lot of other small or smaller nonprofit organizations that really have to figure out how they're going to use their resources to their best effect."*

Other organizations are more severely limited in their capacity, especially if they are small or if staff are already overstretched with high demand for their services. As an executive director and founder of the 20-year-old Mid-Atlantic Veterans Service Organization put it:

> *"Well, I mean, I do believe that there is only a percentage that a 501(c)(3) can get involved with that type of thing. But to be honest, I simply don't have the time."*

Some organizations hinted at what would help them overcome time and resource constraints, particularly the implications of not having a formal structure with dedicated staff that could devote their time to advocacy activities. As one executive director of the Agricultural Nonprofit noted:

> *"Unless you have someone paid on your staff to really focus on [advocacy], you can get pulled away from that focus. I think that is where we are right now in more of that reactive stage. I think there's a lot of nonprofits that are in the reactive stage of things and don't necessarily see the through lines of connection in the work and how supporting and advocating for certain things can make your life and your client's life and your organization healthier. I don't know. I'm a big proponent of advocacy work."*

2. Lack of expertise and an understanding of the rules are also persistent barriers.

While the most prominent issues nonprofit leaders mentioned were limited capacity and the inability to dedicate resources to advocacy in addition to their main programs, they also commonly cited a lack of knowledge or a misunderstanding of the rules on 501(c)(3) engagement in advocacy activities. Several leaders we interviewed mentioned or displayed a lack of understanding of the laws and regulations related to nonprofit advocacy activities, such as how to navigate the policy process or identify effective policy solutions to complex structural issues.

Nonprofit executives in many interviews reported that the complexity of IRS regulations and a lack of understanding of federal, state, and local laws have prevented them from engaging in policy advocacy. As one director of the medium-sized Arizona Food Assistance Nonprofit summarized:

> *"I know that there could be a line between what we can do and what we can't do because of our nonprofit status. And I'm not sure that I necessarily understand where that line is."*

Some organizations struggle to achieve full buy-in for their work due to differing understandings of advocacy between staff and board members. As one executive director of the California Immigrant Legal Services Organization said:

> *"So we are having this transitional board where the board has been historically just supervising the day-to-day work of the direct services. And I don't think that our board is completely knowledgeable about what it takes to do the advocacy piece. And so it's been kind of a rough start. And I would say our staff has kind of been going at it alone."*

For other organizations, this lack of understanding mostly affected their staff, stakeholders, or other organizations in their networks. The executive director of the Texas Child and Family Services Nonprofit, who had experience working in government, expressed frustration with the perception that nonprofits should not engage in advocacy. In his opinion, there was a need for:

> *"... a clearer guidepost on that, on the not-for-profit end. On the other end, it's 'informing government.' This is okay. In fact, you should encourage it. If you want information, don't just call it, 'We're learning from you.' It's like, 'No, this is advocacy. Call it what it is and it's okay.' So everybody's got to know that it's okay to do. I think right now it's like, 'Oh, you better be careful.' I mean, I'm cautious anyway. And I think let's put it out in the open, make it something that should be deliberate, and it should be part of every not-for-profit's work. Don't be afraid to say it."*

However, other organizations described confusion around the complexity of the rules, especially with many overlapping levels of regulation, such as having different rules or expectations for various aspects of their work. Some leaders also expressed incorrect assumptions about lobbying restrictions. For instance, the leader of the mid-sized New Mexico Child and Family Service Nonprofit, which has multiple partnerships with government, said:

> *"Well, there's a fine line that we have to be very cautious about. As a nonprofit organization, we have to make sure that we're adhering to some of the expectations … that just really makes it difficult at times. But also, we work within different structures. So for example, my particular organization … we reside in a city-owned building. And so we work through the city government in many areas … [on the state level,] we are each our own 501(c)(3), but we work collectively as an alliance to advocate for whether it's when we go up for legislative funding, but we also can't really lobby because that goes against all of the requirements that we have to adhere to. And so there's understanding the confines of the work where we can advocate, where we have to be a little more cautious is really important."*

Practical barriers also exist that hinder nonprofits' understanding of how to engage in the policy process and effectively conduct advocacy. Nonprofit leaders highlighted the complexity of the policy process and various practical issues they encountered while coordinating or conducting advocacy efforts. For example, one nonprofit failed to pass a bill in the state legislature due to the legislative process, which prevented it from being funded within the same year of its passage. Another organization described difficulties navigating their state's policy process, noting that the rapid pace of the legislature sessions made it challenging to react swiftly to proposals and changes.

Nonprofit leaders mentioned the difficulty of scheduling and physically bringing people to the state legislature, including issues as simple as the hassle of finding parking at the state house. Others spoke about the time commitment required for advocacy, especially in terms of getting board members and direct service staff to advocate at the policy level or at advocacy events. Some organizations also struggled to achieve consensus among a diverse or large staff on their specific stances and policy priorities.

While it was not a common issue explicitly described by many organizations, an acute barrier to advocacy for some organizations was not being "in the know" – i.e., they lacked awareness of policy issues that affect their organization or even an understanding of how policy affects their organization. This issue is a potentially severe limitation to organizations' advocacy engagement, but there were many examples in our interviews of how organizations overcame this barrier. Specifically, nonprofit leaders described strategies and tools many organizations use to learn about policy issues, proposals, bills, and discussions that affect their organizations and the people they serve.

Nonprofit leaders frequently cited the fear of appearing political as a common barrier to advocacy engagement. This fear often stemmed from a misunderstanding that nonpartisan policy advocacy is the same as partisan political activity. Additionally, the current politicization of many policy issues has led to disagreements on nonprofit boards and among staff about whether advocacy on a specific topic might be perceived as politically biased. There was also the concern that advocacy efforts could conflict with the personal political beliefs of some nonprofit board members or employees.

For some nonprofits, this is particularly problematic because their mission areas and policy issues are often politicized or perceived as aligning with a specific political perspective. This can create dilemmas for nonprofits trying to be responsive to the entire community. Some organizations clearly confused policy work with political activity, further complicating their advocacy efforts. As the executive director of the Women's Mental Health, Recovery, and Housing Nonprofit explained:

> *"It's just not my thing. Getting involved in the policy side, in the politics of it. I would much rather pick and choose where I want to support than lead a charge. My passion really lies with what we're doing right here and working with the individuals that we serve, and it just isn't in politics."*

The final practical barrier described by some organizations was the complexity of the policy issues they face. Nonprofits often exist precisely because there are no clear, straightforward policy solutions to the challenges confronting the people they serve. However, this complexity makes it difficult, if not impossible, to know how to effectively engage in the policy process. For example, the leader of the Midwest Foster and Youth Services Organization for Children with Disabilities expressed exasperation with the complexity of adequately representing children they served when the state was technically their legal guardian:

> *"We try. We are in a very unique position being a private agency because we are a non-custodial agency, which means that the counties that have custody of our kids retain custody of our kids. So we do have some organizations here within the state … that will go to bat for our kids on these issues, but you have to have the permission of their guardians because they're minors and the guardians are the county, who sometimes make these decisions. So it's really difficult. I think if we had more legal leeway, absolutely, we would be taking more of it, but right now it's hard without a county giving permission for us … Our hands are legally bound."*

3. Government inaction and unresponsiveness stymie nonprofit voices in the system.

Beyond organizational barriers to advocacy engagement, a prominent challenge mentioned by some nonprofit leaders was when government administrators, agencies, or elected officials were unreceptive to addressing underlying, systemic problems. Leaders spoke about being excluded from policy discussions, encountering disinterested government officials, or lacking connections to decision-makers in government. For example, the manager of the Midwest Foster and Youth Services Organization for Children with Disabilities, which worked with government agencies across many counties, explained:

> *"I would say that [one county] as a whole is one where we have tried and tried and tried. Even outside of us as an agency individual, foster families have really tried. And over the course of my 16 years working with [our organization], it has come up over and over and over again, the issues there, and it just has not gone anywhere. The county commissioners don't want to hear what we have to say … maybe we have a little good old boy system that runs this county. Those are the places where we are the least effective."*

Nonprofit leaders sometimes expressed frustration when elected officials at local, state, or federal levels showed little interest in their concerns, requests, or invitations. This lack of responsiveness created an unwelcoming environment for nonprofit engagement. In extreme cases, it even dampened nonprofit partnerships and collaborative networks. This contrasted with situations other interviewees described where local or state government representatives actively created opportunities for interaction among policymakers, agency administrators, and nonprofits.

The environmental barriers created by unresponsive government officials often left nonprofits uncertain about their potential actions, even when they identified systemic problems and understood that resolving these issues would benefit everyone. As the leader of the Northwest Foster Youth Support Organization reflected in a follow-up email after our interview:

> *"System change is important and yet it feels like nonprofits are not often tapped or provided a venue for being heard and validated. There is a lot of nonprofit wisdom that could inform system change but getting your voice truly heard feels like a lot of work, so that is why I am guessing many nonprofits don't participate at the same level as their possible value. Maybe we need to be asking government to create more systems for working with nonprofits than the opposite."*

4. Coalitions can help nonprofits overcome some capacity and expertise barriers.

One of the most commonly cited strategies for *overcoming* organizational barriers to advocacy engagement was to engage with and through networks and coalitions. Many nonprofits reported joining existing coalitions. For organizations just starting or expanding their advocacy efforts, coalition engagement provided a way to participate in advocacy without demanding excessive staff time, thereby helping to address many of their capacity challenges. For example, the founder of the Mid-Atlantic Veterans Service Organization, which is focused on direct services, responded:

> *" … people know me … that are starting these different processes of trying to change stuff. So, they'll reach out to me. And … if it's something that I totally believe in and I feel like after 20 years I kind of know what's going on here, then yes, we'll be part of that with them. But … we're such a direct service organization that I don't really have time to do a lot of that stuff other than signing onto a letter that I agree with that's going to go to Congress."*

Leaders highlighted several additional benefits to working in coalitions, beyond addressing their capacity concerns. For some, coalitions helped them overcome knowledge barriers by providing insights into operating within nonprofit lobbying regulations. For others, coalition partners shared specific strategies, enhancing their overall advocacy efforts. For example, the executive director of the California Immigrant Legal Services Organization discussed how they learned a specific lobbying tactic from coalition partners and how that has paid off:

> *"… we've really spent a lot of time learning how to get an audience with a government official. That was really something that was really surprising for us. And so, we kind of have a strategy now of who to reach out to, when to email, how to make a phone call, how to get an introduction, all of those kinds of stuff. There's a litany of expectations that goes into how to do that, whereas before we were like, 'We don't know where to start. We don't know what to do.'"*

Many other organizations discussed engaging in coalitions to extend the reach of their advocacy efforts beyond their specific scope of influence. For example, the CEO of the Minnesota Family Service Nonprofit said this when asked about the main benefits of coalitions for her organization:

> *"I always think that when you bring different people together, especially since we have people that they would approach for child abuse prevention, some from a very educational standpoint, some of us from a programmatic standpoint, some of us from a communication standpoint, we're going to make each other stronger and we're going to have kind of shared resources. So if we're doing an awareness campaign, then they can kind of piggyback off of what we've learned … And I think also, again, you're going to be much more effective if you have more voices, if it's a much stronger argument, especially with legislators who listen to the population at large a little more than they do if it's just one person saying, 'This is important.'"*

For other nonprofit leaders, the benefits of coalitions came from creating stronger connections with other organizations and people in their networks. Engaging in networks also helped organizations build legitimacy and influence. As the leader of the Northeast Food Equity and Access Nonprofit described:

> *"Another barrier is having or not having the network or connections to people with power … officials or legislators, things like that. If you don't have direct access to them, sometimes the letters and phone calls to their offices don't work because people won't respond. However, if you do, then typically it's a little bit easier to get their attention. I know in our early days before we'd established a lot of those connections, it was a really big barrier to get anyone to listen."*

5. Board support is an important way to overcome advocacy barriers.

Many leaders of organizations with established or growing advocacy practices emphasized the importance of support from their boards of directors. This support was particularly crucial for overcoming the many capacity challenges executive directors face. Boards contributed in several ways: strategically deciding which issues to advocate for, connecting staff with people in their networks, developing job descriptions and roles within the organization specifically for advocacy, helping the executive director develop a staff structure to accomplish those goals, and allowing for time within the executive director's job to engage in advocacy efforts.

The executive of the West Coast Center for Individuals with Intellectual and Developmental Disabilities said he convinced his board that legislative advocacy would be a valuable line of work for them. The executive director emphasized that it took time to prepare the organization by establishing a solid organizational structure and smooth operations before they could fully step into advocacy roles. His ability to accomplish this came partly from board support for hiring and developing strong program leadership below him:

> *"If I didn't have strong program leadership, I couldn't do this [advocacy] work … When I first came on board, I didn't do any of it. I took a couple of years to make sure that the train is right on time, that we could pay our bills, the nuts and bolts of running the business. And then it was like, now we've got to work on programs to make sure our people are supported well, that they enjoy what they're doing, and obviously work on a workplace culture. Once that was pretty well established, and that's perfect, then I could be more assertive in working in these other agreements. I, again, with the board's consent, decided to take more of an effort in legislative advocacy in particular."*

For other organizations, board members played a more instrumental role in advocacy efforts. Some nonprofit leaders described their advocacy initiatives as being directed by board members, or, more commonly, with board members directly engaging in advocacy activities. This active board engagement helped alleviate capacity and time constraints for staff. However, board members must understand the role of advocacy within the organization's mission and recognize that IRS regulations permit nonprofit advocacy. For some leaders, obtaining board support required orienting board members around advocacy goals or educating board members on advocacy rules. For example, the executive director of the California Immigrant Legal Services Organization reflected:

> *"Everybody in the nonprofit world knows that you're not allowed to lobby for or against a specific candidate. That's the standard thing everybody loves to talk about. And board members love to say that because that's the thing that Board Source gives you … And it's like, 'We're not lobbying for or against candidates … We don't care about who's in power. We care about what policies are in place.' I mean, political people are fleeting, policies are long-lasting. We care about policies. And so, I don't really get the sense that the board has enough institutional knowledge about what we're doing in order to guide us on the advocacy stuff."*

Nonprofit leaders found that board support for advocacy engagement often did not come immediately. Leaders discussed sometimes having board members who were not supportive and having to carefully select members who were supportive to shift the organization into advocacy work over time. Others described the importance of building a board with connections to better support external advocacy activities. Finally, some organizations pointed to the board's important role providing strategic guidance on when to engage in advocacy issues. This was cited as being important to preserve resources for strategic action and ensure advocacy was aligned with core mission activities.

Conclusion

Nonprofit leaders described many practical barriers to advocacy, including time, capacity, and expertise. Only a few executive directors mentioned feeling like government funding restricted their advocacy. Government funding was more often described as supporting nonprofit advocacy engagement because of the connections such funding relationships provided. Nonprofit leaders also underscored the importance of receiving information on policy issues, proposals, and changes through those relationships. Several leaders said government played an important role in creating an environment that was conducive to nonprofit advocacy. Beyond government, nonprofit boards and coalitions were also important for helping nonprofits overcome capacity and knowledge barriers.

Ultimately, our conversations with executive directors pointed to the importance of trial and error and incrementally building expertise and strategies to overcome capacity challenges over time. The most effective advocacy organizations demonstrated persistence, creativity, and a commitment to remaining aware of policy issues that affected their work, along with a commitment to building strategies to effectively engage with government officials and policymakers.
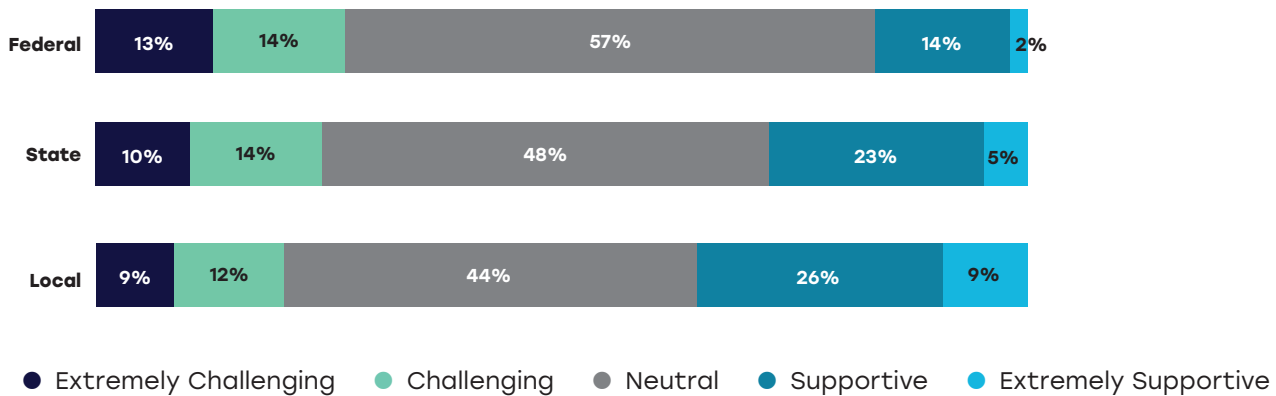
? Question 3:
Do nonprofits think the government generally supports their missions? How so?

The political environment can motivate or discourage nonprofit advocacy and dictate who nonprofit practitioners talk to in government. The 2022 PENS study offered some insight into how nonprofits view policy environments at different governmental levels. Figure 3 shows responses from the 2022 PENS project about how nonprofits rated their local, state, and federal political environments. Close to half of nonprofit leaders rated each political environment as being neutral. However, there are interesting distinctions between the three levels. As shown in Figure 3, nonprofit leaders rated local governments as being more supportive than state, and state as more supportive than federal. About 35% of nonprofit executive directors said their local political environment was either extremely supportive or supportive, while nearly 28% said this about their state environment and only 16% said it about the federal environment.

FIGURE 3: VIEWS OF POLITICAL ENVIRONMENTS FROM THE PENS REPORT

How would you describe each of the following political environments faced by your organization?

	Extremely Challenging	Challenging	Neutral	Supportive	Extremely Supportive
Federal	13%	14%	57%	14%	2%
State	10%	14%	48%	23%	5%
Local	9%	12%	44%	26%	9%

● Extremely Challenging ● Challenging ● Neutral ● Supportive ● Extremely Supportive

Source: Faulk et al. (2023).

To better understand what informs nonprofit leaders' perceptions of government support, we asked these questions in our interviews: What kinds of support are nonprofits looking for from government? What experiences shape their perceptions of local, state and federal governments? What does government support allow them to do? Several themes describing nonprofit responses to these issues emerged during our conversations.

1. Nonprofits associate government support with funding.

When asked if they think the government generally supports their organization's mission, most nonprofit leaders described the extent to which their organization receives government funding, including information about why this funding is crucial, how they get government funding, and what this funding signals, along with its drawbacks. Fewer nonprofits mentioned specific government policies that impact their organizations or the sector more widely. Several nonprofit leaders simply stated that they think the government supports them because they receive government funding, which allows them to carry out their core mission activities. For example, the leader of a large organization, the Midwest Nonprofit for the Disabled, responded to this question saying:

> *"I would say yes. I would say yes because we do receive funding and we are paid for the services we provide. As far as making sure that people's lives are supported, we receive government support to do that."*

Among nonprofit leaders, many also said that government funding is a vote of confidence in the value of the nonprofit's work. For instance, leaders talked about how funding shows that government officials think they are doing a good job or that their services should be expanded. The leader of the Ohio Housing Organization said:

> *"Locally, I see success as being the recipient of the largest CDBG [Community Development Block Grant] award in the city over the past decade. To me, that's a commitment or a point of confidence ... We're about to receive significant grant funding through ARPA [American Rescue Plan Act], and to be able to expand that grant program locally ... it shows us that the county recognizes our position in this space."*

Several leaders who said the government supports them through funding specified that it is important for their organizations' survival. For instance, some noted that most of their funding comes from government sources or that they consistently get the same grant each year. Some also said that government entities have stepped in with funding during difficult times to ensure their organization's survival, or that the government pays attention to cost increases when formulating their contracts. For instance, a nonprofit leader from the Midwest Rehabilitative Service Provider said:

> *"What we've seen with the cost due to inflation, labor market's obviously quite challenging for businesses and stuff, and the cost of providing services has gone up tremendously. But they've been real good with amending our contracts and rates to offset some of the challenges we're seeing with the cost of providing services to the individuals we serve."*

For some organizations, government funding connections also came with other forms of support, such as regular meetings, which led to further funding opportunities. As one leader from the Delaware Neighborhood Human Services Organization said:

> *"Well, the state does directly support us, which is great. Also, their agencies – there's a Department of Aging, there's a Department of Social Services – we have monthly routine meetings with them. They keep us alert of other resources that we can utilize or that the people we serve can utilize."*

Nonprofit leaders often compared the degrees of support they experience from different levels of government. Several leaders singled out local government as being supportive of their work, and some said it was easier for them to get local funding than state or federal funding. This was also true for other forms of government support – leaders most often referenced local support rather than state or federal. One leader of the Southern Food Access and Nutrition Security Nonprofit said that local government had the highest capacity for flexibility. A few managers specified that they did not receive funding from the state or federal governments, with one manager of the California Immigrant Legal Services Organization saying that the Biden administration did not financially support immigrant assistance. However, this was not universal, and other leaders did point out that they get steady funding from either state or federal governments, or both.

On the other hand, nonprofit leaders reported several challenges with government funding. A few leaders felt they lacked support because government did not fund their mission area. For instance, one leader of the Arizona Food Assistance Nonprofit expressed their belief that they and other food assistance organizations have a large positive impact on well-being in the state, but that "there isn't any kind of concentrated effort that we need to make sure we're funding food banks broadly."

For some organizations, this challenge appeared to stem from their mission activities not fitting clearly within current government funding trends and priorities. For example, a nonprofit manager from the Debate Club for K3–12 noted that their local government is more eager to fund other issues within their broader field than they are to fund their specific mission focus:

> *"Trying to get money from the city government has been a lot easier for workforce development because it feels very concrete; we're taking our young people who may not be prepared for college or career and then helping them develop some skills. This is not exactly that, so it's kind of hard to do that."*

Other nonprofit executive directors spoke about experiencing unrealistic expectations from government entities about what they could accomplish with a certain amount of funding. These leaders said that some government requests for proposals ask for a larger scale of work than is possible with the funding offered, or that government had not reimbursed them for extra services they provided in emergency situations. One leader from the Midwest Rehabilitative Service Provider said that when they explained this problem to government contacts, they saw an improvement:

> *"We went through a one- or two-year period where nobody bid them just because you can't take something on that you can't afford, that's going to be a failure because the lack of funding or whatever … But I've seen the state kind of listen to us, so to speak, and … It increased the funding."*

Other managers mentioned restrictions that come with government funding. For instance, they struggled to achieve government contract requirements when they were not allowed to spend the grant on overhead expenses. The Northeast Poverty Organization and Community Center leader said that the reimbursement system for government grants is often challenging:

> *"There's another nonprofit that was pretty strong, but it was entirely reliant on federal grants and state grants. Try making your payroll when you're waiting for those reimbursements; you can't. And so you end up skipping a payroll and that's the end of your nonprofit."*

A handful of leaders said that these drawbacks led them to reevaluate the role of government funding for their organizations. Although this was not as common among our interviewees, some organizations intentionally did not seek government funding, and some were strategically reducing their reliance on government. The executive director of the Mid-Atlantic Veterans Service Organization described not seeking government funding to make sure they would be able to respond to emerging needs. As she noted:

> *"We don't go after government grants or anything simply because it's too much red tape. I don't have time to do that. When our warriors, who are very proud and don't like to ask for help, come to us, it's a full-blown fire. And so we don't have weeks of trying to figure out if we're in compliance with the federal government grant, propose, and all that. I just don't have time for that and the reporting and all those kinds of things; we would need more employees."*

Our interviews made it clear that nonprofits most often expect government support in the form of funding, although they mentioned other forms of support as well.

2. Nonprofits value policy support from government.

When asked if they think government supports them, nonprofit leaders also spoke about whether they had received support in their specific issue area. For instance, they talked about policy decisions they agreed with, examples of government officials aiding them in policy advocacy, and officials helping them navigate policy regulations.

A few leaders described specific politicians who made decisions they agreed with that support their organizations' missions. For instance, the leader of the Colorado Mental Health and Substance Abuse Nonprofit described how their governor created a new Department of Mental Health in reaction to data that showed the state was performing poorly in that category. She perceived this action as support for their mission. Similarly, a manager of the Arizona Family Resource Center spoke positively about their governor, who they said formerly worked as a social service provider and thus understood the sector:

> *"So, we now have a governor who has vetoed hundreds of bills, most of which are not so dissimilar to some of the ones from parts of Virginia and other parts of the south. So we've had a bulwark, and she's been able to push also a few policy agendas that are more supportive of children, early childhood education, mental well-being."*

Some nonprofit leaders described how public officials supported their work by advocating for policies the nonprofit supports. One leader from the Southern Food Access and Nutrition Security Nonprofit described how a politician, who they did not expect support from, became an enthusiastic supporter following work they did to educate the politician about their issue:

> *"… we have done lots of education with this group over the years that he's been in office. And they have become incredible supporters of our work, our SNAP [benefits] program, small farmers in general."*

A leader of the Southeast Foster Care Support Organization told a story about their idea for a program to provide volunteer childcare. They had been pushing for the program for some years with no support, but then local officials decided to back the program. The executive director said:

> *"[Now] they're very much cheerleading this effort and being that voice within the county government leadership to say, 'This is something we need. We care about this.'"*

Nonprofits also discussed how government officials have helped them navigate policy regulations to carry out their mission activities. For example, they described local officials helping them access more building space, giving them advice about programming, and informing them of local politicians they can call about a problem.

The leader of the Mid-Atlantic Veterans Service Organization said some politicians are responsive to their needs, but others are not:

> *"I don't know if everybody does, but if one of my veterans is really having a terrible problem and I'm not able to get anybody to listen to me, either we go to the congressmen or the senators of their area and ask them to help. Most of them have a military liaison that would speak with us. And in some cases, they're phenomenal. They jump right on it and they move forward. In some cases, we don't even get a response. So that's a little discouraging."*

This leader said they appreciated those elected officials who helped them serve their clients, but that those who did not reflect poorly on government.

Another common response was that government officials support nonprofit missions when they are not controversial, or when the public perceives the population they serve as deserving. Executive directors who responded in this way said that their mission had broad support from the public and politicians, that their issue area does not create conflict, or that specific government programs they are involved with receive bipartisan support. For example, the manager of the Delaware Neighborhood Human Services Organization said, "For us, our mission is pretty basic and we're doing essential services; we're not doing anything controversial."

Some nonprofit managers said that the population they serve is generally thought of as deserving of attention, so they get support. For example, the leader of the Midwest Foster and Youth Services Organization for Children with Disabilities said, "Who's going to come out and say they don't support kids with disabilities?" Similarly, a manager of the Southern Child and Family Services Nonprofit noted:

> *"Taking care of our seniors is something that people really support. Taking care of our veterans … is something that people are supportive of, no matter what the ideological beliefs are. With that in the middle, we deliberately, in a lot of respects, manipulate things in some ways to get what we want to get on the policy front."*

This manager implied that they can glean support from government based on the broad political support for programs serving these populations. Nonprofit leaders value government officials who are responsive to their policy needs, whether that be in the form of policy change or simply help navigating existing policy.
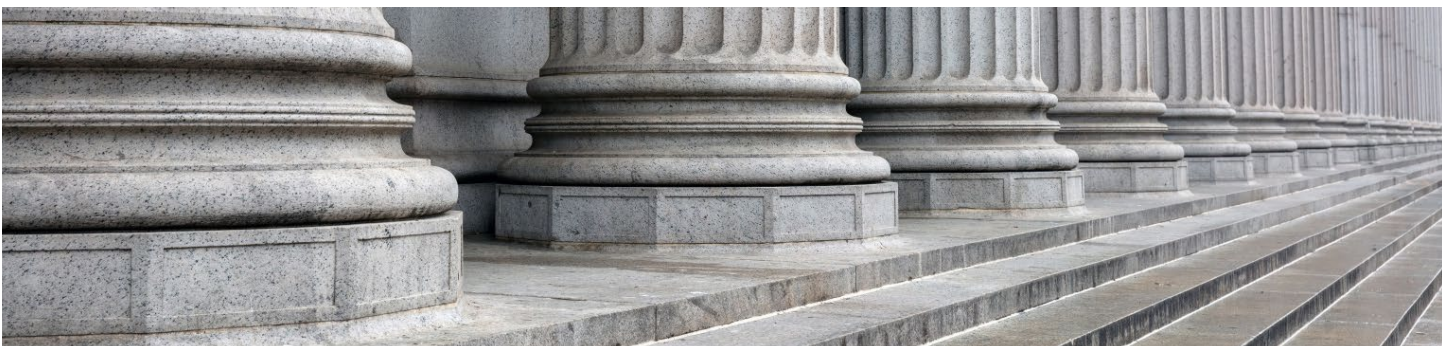
3. Nonprofits want a seat at the table.

While not as frequently mentioned as funding or issue area support, nonprofit leaders did talk about support in terms of whether government gives them a "seat at the table" in policy or programming decisions. Several said that when they were part of the conversation around policy issues, certain officials would take their advice, or that they thought some officials respected their organization, which is why they gave them access. For instance, when asked if they thought government supports their mission, the manager of the Northeast Women and Girls Nonprofit responded:

> *"Well, I would say that we are respected by a large swath of legislators. When we ask to meet with them, we get the welcome wagon, 'Yes, absolutely. Let me bring my team. Let me give you the time that you need. What do you need from me?' for the most part. So I would say we get support from the government that way."*

Some were more specific, saying that government officials would listen to their advice about which programs should be funded and what is important on the ground. For example, the Arizona Family Resource Center executive director described their interactions with a state agency official:

> *"So, we can go meet with him, and I have, and say, 'Here's how you should be contracting differently,' or, 'Here's a way that we could spend precious dollars a little more strategically.' So he's been very open to hearing ideas from people like me and our colleagues."*

This leader said they appreciated that the state official was willing to listen to their advice and trust their on-the-ground expertise.

While less common, a handful of nonprofit leaders expressed that government did not allow them a voice in decision-making. The leader from the Northeast Poverty Organization and Community Center said this was the biggest barrier to them engaging in policy advocacy, specifically within their state and city political environment:

> *"We don't have a seat at the table. We're not invited to the table. There's no interest. And part of that is because there's no interest in our constituents. There's no interest in addressing poverty ... and our folks don't vote. They should vote and we try to get them to vote, but they are mostly single moms, absentee father, never was a father, father's probably in jail, and they don't matter. They simply don't matter to the politicians."*

While the extreme case of a challenging political environment was not common in our interviews, some nonprofit leaders described instances when government officials did not include them at the table for policy decisions that clearly overlapped with their work. For these organizations, this was a frustrating challenge. Governments were making decisions that affected them and the communities they served without asking

for their advice. This was especially true with respect to service provision. The leader from the Women's Mental Health, Recovery, and Housing Nonprofit described this as a common occurrence:

> *"I will say one of the challenges that I feel is consistent is that the government will make decisions at a government level and they don't really take into consideration what's happening on the ground and in the trenches. I believe it feels like decisions are made and then there's pushback and then change comes. It always seems to take time, and I just wish that somebody would ask."*

Other leaders described instances when government cut off funding for a program without warning, or when policy decisions had negative unintended consequences for the nonprofit's sector. Overall, readers said that they felt most supported by government when they received funding, were supported through policy, and had a voice in decision-making.

4. Building relationships with government is crucial.

Almost all the nonprofit leaders we interviewed emphasized that building close relationships with government officials was imperative to their success, both in their core mission activities and in policy advocacy engagement. Leaders stressed the importance of building relationships with government personnel to gain access, to ensure they had a voice in decision-making, and to cultivate and maintain funding streams.

The most basic way that nonprofit leaders spoke about building relationships was related to simply gaining access to government officials. Executive directors emphasized that, if you cannot get public officials to talk to you, it can be detrimental to both your core mission and advocacy activities. For instance, the leader of the Midwest Foster and Youth Services Organization for Children with Disabilities lamented that they often lacked this access:

> *"There's no recourse, so to speak, for when these things happen ... unless you find the right person at the county to make that change or to say, 'I have a problem with this issue,' it's not going to happen."*

The manager of the Women's Mental Health, Recovery, and Housing Nonprofit emphasized the importance of not taking an adversarial position toward government:

> *"For me, it's really important not to, even when things are frustrating or taking a long time, I mean, you really got to guard those relationships and realize that it is not the individual. It's just that, like I said, the bureaucracy and being able to maintain good relationships so that when doors open, you're able to speak to whatever it is."*

Nonprofit executive directors also said that having relationships with government officials was helpful for their core mission activities. Some noted that it was easier to solve regulation or logistical issues with these connections. For instance, the leader of the Center for People with Disabilities explained that even though they did not receive local government funding, they thought it was valuable to maintain relationships with local officials because it gave them better access to town spaces and other logistical assistance. Another leader, who was from the California Youth-Focused Homeless Services Organization, said that the connections their board members had with local officials were helpful for their daily operations:

> *"We've always had the benefit of being able to call a board member and say, 'This is an issue we're having. How can we figure this out?' And just based on that conversation and relationship, we've had the benefit of having someone say, 'Yeah, I can call the mayor. I have been the mayor. I know the city manager; I can call them.'"*

Nonprofit leaders also said that government relationships ensured they had a voice in policy decisions. Some noted it was important to build these relationships so legislators knew they had information that was valuable to the policy-making process. They said this was helpful when they were trying to educate

legislators about problems in their sector and explain why their nonprofit was needed. For example, the manager of the Midwest Nonprofit for the Disabled said:

> *"...we've put a lot of time and energy into building relationships with legislators and building a pipeline with those coming into the legislative process, those that are going to run, those that are interested in running, making sure people are educated, not necessarily winning anyone to our side, but making sure that people understand what our mission is and why it's important."*

Several nonprofit managers said that having access to government officials was important for advocacy work. A few highlighted that it was crucial to have access to legislative staff because they were the people who controlled the flow of information to lawmakers. For instance, the leader of the West Coast Center for Individuals with Intellectual and Developmental Disabilities said that when trying to work with elected officials, "Oftentimes the most powerful folks that you'll be in contact with are the aides that work for those people." Some mentioned that relationships with government officials were the most important factor for advocacy work.

Nonprofit leaders also emphasized that government relationships were imperative to winning or maintaining funding. Some specifically said this was their motivation in building relationships with officials. These managers described seeking out a particular elected official, inviting officials to their events, and helping create an advocacy coalition, specifically to advocate for funding in their issue area. For example, the leader of the Texas Child and Family Services Nonprofit described an advocacy coalition of service providers that he helped organize:

> *"The whole purpose was to develop better relations with city government so that we could actually advocate for programs and more money in certain areas. I think we have been marginally successful, and that's because we now have the ears of the city manager who runs the city. We have the ears of the mayor, certain council members who are sympathetic. So, we're getting much more play, and that's helpful."*

Conclusion

Through our conversations with nonprofit leaders, we learned more about what they expect from government, how their experiences have impacted their views of government support, and how they cultivate government support. Three categories of government support stood out as valuable to nonprofit leaders: funding, policy advocacy, and access.

Almost all leaders spoke about government funding when asked if government supports them. The level of government funding was related to their perceived level of support. Leaders said they value government funding for its ability to aid in organizational survival and help them fulfill their missions. Some executive directors mentioned that government funding comes with drawbacks, such as unrealistic expectations, restrictions, and delays. They also spoke about different degrees of funding at different levels of government, with an emphasis on the support of local governments.

Nonprofit leaders said that they value substantive policy support from government. Some described how they have had government officials make policy decisions they either agreed or disagreed with, or that officials have helped them to advocate for policies they support. Nonprofit leaders also spoke about how some government officials helped them navigate regulations, which enabled them to carry out their mission activities.

The nonprofit leaders we interviewed also said it is valuable when government officials give them a seat at the table in decision-making. Some said they receive such support from government, but a few said they do not. Some managers described experiences when government officials made decisions without consulting nonprofit experts that resulted in negative consequences.

Nonprofit leaders also emphasized the need to build relationships with agency workers, politicians, and legislative staff. Some explained how this is important for maintaining funding streams from government, and some spoke about how relationships with government are crucial for advocacy activities and for ensuring they have a voice in policy discussions. Others simply stated that building relationships is necessary for gaining any access to government.

?
How do diversity, equity, and inclusion issues matter for nonprofit advocacy work?

Nonprofit organizations play a pivotal role in advocating for policies that significantly impact vulnerable and marginalized groups. Through a strategic integration of DEI in their missions, nonprofits not only aim to reflect the communities they serve but also actively engage in creating equitable systemic changes. This integration is particularly crucial in terms of how advocacy efforts can positively affect those who are often sidelined in societal structures.

The 2022 PENS study underscored the significant relationship between DEI initiatives and nonprofits' policy engagement activities, particularly in advocacy and lobbying. As shown in Table 4, nonprofits that articulated DEI statements showed a markedly higher engagement in advocacy and lobbying than those without such statements. For instance, 36% of nonprofits with a DEI statement were engaged in advocacy and lobbying, compared to only 22% of those without one. This suggests that nonprofits that commit to DEI principles are more likely to participate in policy-related activities, potentially because such commitments align with broader social impact goals that often necessitate advocacy work.

TABLE 4: POLICY ENGAGEMENT AND DEI

	Nonprofits with DEI Statement (63%)		Nonprofits without DEI Statement (37%)	
	Advocacy/Lobbying Engagement	**NO Engagement**	**Advocacy/Lobbying Engagement**	**NO Engagement**
Advocacy/Lobbying	36%	64%	22%	78%
Dedicated to DEI				
Budget/funding	45%	32%	14%	7%
Staff time	59%	42%	22%	9%
Board/volunteer committee	49%	41%	14%	11%
DEI Investment Level Index (0–3)	1.5	1.2	0.5	0.3

Source: Faulk et al. (2023).

Furthermore, the level of investment in DEI across different resources, such as budget/funding, staff time, and board or volunteer committees, was significantly greater in nonprofits engaged in advocacy and/or lobbying activities. The 2022 PENS findings suggest that nonprofit allocation of resources to DEI initiatives enhances their capacity to effectively engage in advocacy and lobbying. This reflects a strategic approach to fostering inclusive and equitable change through policy influence.

The close relationship between DEI commitments and advocacy and lobbying calls for a better understanding of how nonprofit executive directors and their organizations view DEI in relation to their policy efforts. Our qualitative interviews with nonprofit leaders led us to identify several themes regarding the role of DEI in nonprofit advocacy and lobbying. These discussions highlighted how deeply DEI commitments influence the strategic decisions and actions taken by nonprofits in their policy engagement.

1. In order to advocate for community-specific needs, nonprofit organizations strive for governance that reflects community diversity.

Nonprofit leaders emphasized the importance of having governance that mirrors community diversity, which they said is vital to advocating for community-specific needs. They specified that a commitment to governance that reflects nonprofits' communities ensures that advocacy efforts are grounded in the needs and aspirations of those they serve, especially those that are vulnerable or marginalized. During the interviews, several nonprofit executive directors mentioned the significance of aligning the demographic composition of the organization's board with the diverse demographics of its service recipients. This involved proactively seeking board members who represent the various backgrounds and experiences of their constituents and ensuring that advocacy efforts resonated authentically with the community's actual needs. For example, the director of the Colorado Cancer Patient Support Nonprofit said:

> *"We also try then to take a look at our board of directors to say, 'Okay, we need to address this. We need to have women of color, we need to have women.'"*

This statement reflected a conscientious approach to board recruitment, prioritizing diversity and inclusivity. The director's acknowledgment of the past president, a 60-year-old woman of color and former grantee, highlighted the organization's commitment to fostering a leadership team that mirrored the community and effectively advocated for its interests.

Leaders said that nonprofit boards that reflect the diversity of their community had a multifaceted impact on their organizational effectiveness and community engagement. For instance, a representative from the Northeast Food Equity and Access Nonprofit noted:

> *"We try our best to ensure our board of directors is a reflection of our community … The importance of that is to ensure that the work our organization does is guided by the people who have stake in the community."*

This approach underscored nonprofits' commitment to DEI by ensuring that the nonprofit's actions were guided by individuals who had directly experienced the structural inequities being addressed. By having a board that reflected the diversity of the community, nonprofit leaders said they could better understand and address the unique challenges faced by different groups, thereby creating more effective and inclusive advocacy strategies.

A few leaders emphasized that having a board reflective of community diversity was crucial for addressing systemic issues. The executive director of the Midwest Organic Food Safeguard Organization highlighted the importance of internal reflection and structural changes, and her statement suggested how internal DEI efforts could influence external advocacy and storytelling:

> *"We started doing this bi-weekly meeting with all staff to talk about white supremacy issues and white supremacy thinking … that work has changed some of our communications in terms of what stories we tell."*

In practical terms, nonprofit leaders said that diverse boards are better equipped to build relationships and trust within their communities. The Mid-Atlantic Veterans Service Organization leader illustrated this by noting:

> *"We all kind of build relationships with people that some people wouldn't want to talk to … But that's so important to talk to them. Sometimes that's the most important thing we do is provide that open door to reach them."*

While such representation fostered trust and deeper engagement with the community, nonprofit organizations that serve diverse communities found that having board members who reflect that diversity helped when tailoring their services more effectively. For instance, the manager of the Midwest Nonprofit for the Disabled said:

> *"It matters a lot because we have a population that is very diverse, and they want to make their own choices … they're part of a protected class of people that don't always get a choice."*

Further, nonprofit leaders explained that integrating diversity into the board structure was not just about representation but about embedding the values of equity and inclusion into the fabric of their organizations. A diverse board helped ensure their advocacy strategies and engagement in policy discussions were inclusive and equitable by bringing varied perspectives that addressed the root causes of disparities.

Overall, nonprofit leaders underscored the importance of having a diverse board when it comes to enhancing organizational effectiveness and ensuring their advocacy efforts are inclusive, equitable, and truly representative of the community's needs.

2. Advocacy initiatives are more effective when they thoroughly reflect the diverse needs of the community.

The insights from the interviewees highlight the necessity of not just superficially acknowledging but deeply understanding and authentically representing the varied populations affected by policy issues. Numerous interviewees underscored the critical role of engaging with a variety of groups to ensure the effectiveness of advocacy initiatives. The executive director of the Colorado Mental Health and Substance Abuse Nonprofit emphasized the fundamental connection between understanding and addressing issues that affect specific populations:

> *"We can't advocate for issues that impact certain populations if we don't know about them. The best way to know about the issues that impact specific groups is to engage with people who belong to those groups."*

Several other leaders similarly supported the view that meaningful engagement with people belonging to these groups was essential for gaining insights into their unique challenges and needs. By actively listening to diverse voices within communities, they added depth and relevance to their advocacy efforts, ensuring that they were not only inclusive but also directly responsive to the real-life concerns of those they sought to support. This fostered a more holistic and community-centered approach to advocacy work, enhancing its impact and encouraging stronger connections between nonprofit advocates and the communities they served.

Additionally, leaders noted that communication played a pivotal role in effective advocacy – it bridged gaps between different cultural and linguistic backgrounds, enabling advocates to reach a broader audience. Some interviewees explained the proactive efforts of their organizations to ensure representation and inclusivity by addressing language barriers. The director of the Arizona Food Assistance Nonprofit noted:

> *"We've done some major pushes to find bilingual volunteers to make sure that we can meet language needs specifically for our Spanish-speaking population … We try to always make sure that we have somebody on staff who can help with that. Our food bank manager speaks Spanish. She is Latina so she is most commonly the person to do that."*

Nonprofit leaders said that culturally sensitive approaches were pivotal in advocacy for vulnerable populations, particularly in sectors like childcare where diverse community needs are prominent. By integrating cultural considerations into policy advocacy and service delivery, nonprofits could go beyond merely fulfilling mandates to genuinely enhancing service accessibility and quality. Several leaders discussed how this strategic integration not only ensured compliance but also enriched the overall experience of all nonprofit stakeholders, making programs and advocacy more inclusive and resonant with the diverse cultural backgrounds of the families served.

For instance, the director of the West Coast Center for Individuals with Intellectual and Developmental Disabilities said:

> *"One of the promotions of growth that the country wants to do is to have more inclusive programs, more people who have special needs being served with people who are typically developing ... So one of the things that we were able to do was talk about amending, subsequent to that legislation being passed, certain training offerings and stuff that the state and therefore local providers could get ... You can do that in a way that has cultural sensitivity as well, considering the fact that you have folks with different languages and different cultural backgrounds."*

The executive director further elaborated on the importance of cultural considerations:

> *"DEI is at the heart of what we do every day ... What we need to do is also look at it through the lens of cultural appropriation. How a Latinx family or an Asian family perceives disability is going to be very different, especially if they're non-native speakers. How do we get access to that? How do we break down the silos that exist that inhibit people from being able to get access to services that they in California are entitled to?"*

In short, interviewees highlighted how strategic approaches in policy advocacy and service design that incorporate diversity and cultural sensitivity can effectively improve resource distribution and enhance accessibility for all community members, especially those from vulnerable groups.

3. Empowerment through representation is crucial to ensure marginalized and underserved groups' perspectives are included in policy discussions.

The principle of empowerment through representation ensures that the perspectives of marginalized and underserved groups are not just included but also central to the development of policies that affect their lives. This approach elevates diverse voices to the vanguard of advocacy efforts, significantly enhancing the authenticity and urgency of nonprofit initiatives. Such engagement goes beyond mere participation; it actively involves community members in shaping the dialogue and decisions that impact them directly, fostering a deeper connection between policy outcomes and the people they affect.

The executive director from the Midwest Nonprofit for the Disabled discussed their organization's direct engagement with policymakers, highlighting the effectiveness of personal stories in legislative contexts:

> *"By introducing community members directly to legislators, city council members, and the wider community, we make legislative changes more tangible and immediately relevant. This approach not only ensures that our constituents lead fulfilling lives but also promotes their integration and visibility within the community, honoring its diverse composition at every level."*

Leaders said this advocacy approach both empowered those directly affected by policies by giving them a platform and educated and influenced policymakers by showcasing the real-world impacts of their legislative decisions.

Furthermore, many nonprofit leaders indicated they were shifting toward more inclusive advocacy practices by actively involving self-advocates, families, and broader community members in their efforts. This approach ensured that the voices of those served by nonprofits were not simply heard but were made integral to the advocacy process, thereby influencing substantial and enduring policy changes. This transformation of advocacy into a collaborative and inclusive process increased the impact of these organizations and bolstered their credibility and relevance in the communities they served.

For example, the Debate Club for K3–12, which is in an urban area, took a strategic approach to representation, particularly focusing on empowering youth from underserved communities through debate and public speaking programs. These programs enhanced their educational opportunities and cultivated essential skills such as critical thinking and effective communication. The organization was meticulous in deciding who represented the community in advocacy settings, ensuring that those selected could authentically articulate the community's diverse experiences and challenges, thereby lending greater authenticity and force to their arguments.

In summary, these organizations illustrated a powerful model of advocacy that champions inclusivity and representation, ensuring that all community voices, especially those from historically underserved groups, were not only heard but also fundamental in shaping the policies that affect their lives.

4. Nonprofits face challenges integrating DEI into their advocacy efforts.

Nonprofit leaders shared that they often face several challenges when their nonprofits try to integrate DEI into their advocacy efforts. These challenges included navigating political sensitivities, overcoming internal resistance, and effectively representing diverse communities. Despite these hurdles, many nonprofit organizations developed strategies to address DEI issues and incorporated them into their advocacy work.

Nonprofit leaders said they often find themselves in complex political environments where taking a stance on DEI-related issues can be contentious. For example, the Minnesota Emergency Housing Center faced backlash for their statements about the disproportionate impact of COVID-19 on communities of color and on the murder of George Floyd. Their executive director noted that, while there was no opposition to statements about COVID-19's impact on seniors, discussing systemic racism and police violence against Black people was "verboten" (forbidden). However, they said the organization persisted, recognizing the importance of leading on these issues despite potential pushback.

SECTION 6

Implementing DEI initiatives often required a cultural shift within the nonprofit leaders' organizations – which they said was sometimes met with resistance from staff or board members. A few organizations tried to integrate DEI into every role within the organization, which included conducting an internal equity assessment and hiring a consultant to diversify community engagement. The leader of the Northwest Foster Youth Support Organization highlighted their approach to prioritizing DEI as an essential aspect of the organization:

> "It was like, this feels mission-critical, and so now it's risen among the bubbles of all the things we have to do up."

This focus helped nonprofits allocate resources and attention to DEI initiatives, despite limited capacities. Leaders also discussed implementing specific, actionable goals. For example, the same organization conducted an equity assessment and assigned clear project goals to team members, such as revising HR processes and creating inclusive signage in the building. These efforts ensured that DEI progress was concrete and measurable. However, navigating these initiatives required careful consideration of nonprofit missions and audiences.

This exemplifies how nonprofits were able to balance the need to address important social issues with staying true to their core missions. These examples illustrate how nonprofits prioritized DEI, set specific goals, and engaged in thoughtful advocacy to make significant strides in overcoming DEI challenges.

Moreover, nonprofits recognized that addressing DEI issues was not just about representation but also about creating inclusive and equitable policies. For example, the Midwest Organic Food Safeguard Organization revised its hiring process to remove biases and ensure a fair assessment of candidates. This included not looking at résumés until the final round of interviews and focusing on the candidates' responses to thoughtful questions. This approach led to the hiring of a highly qualified Black Muslim woman who had previously struggled to find employment due to biases in traditional hiring practices. The Midwest Organic Food Safeguard Organization leader reflected on these changes and said:

> "We've changed our hiring process last year … I don't take résumés until the very last round. I instead have created a list of questions people answer in a form … This has helped, and now this year we're joining a racial equity cohort group with other nonprofits in our space."

Some organizations, like the Minnesota Emergency Housing Center, also emphasized the importance of recognizing and addressing diversity issues even in areas with less apparent diversity:

> "Just because we don't have a lot of diversity here, recognizing that fact is important. And then always considering those underlying issues of why that is, I think, is important."

Nonprofit leaders acknowledged this is crucial for addressing hidden or overlooked disparities and ensuring advocacy efforts are inclusive and comprehensive. This expanded approach highlights how DEI principles are both internal organizational policies and powerful tools in advocacy that drive substantial change.

Conclusion

The interviews with nonprofit leaders demonstrated that integrating DEI into nonprofit advocacy efforts is not only essential but transformative. Nonprofit leaders said they face significant challenges, including navigating political sensitivities, overcoming internal resistance, and effectively representing diverse communities. However, by prioritizing DEI as a critical component of their missions, setting specific, actionable goals, and fostering inclusive policies, nonprofits try to overcome these barriers.

Nonprofit leaders recognized that committing to DEI ensured the voices of marginalized and underserved communities were central to their advocacy efforts, enhancing the effectiveness and the authenticity of their initiatives. This focus on DEI led to the implementation of concrete and measurable goals, which directly impacted the inclusivity and equity of the organizations' operations.

Furthermore, revising internal practices to eliminate biases helped nonprofit leaders promote a more diverse workforce. This internal commitment to DEI reflected broader social justice goals and enhanced organizations' capacity to engage in meaningful advocacy. The proactive stance of nonprofits that recognize and address diversity issues even in less diverse areas highlights the importance of acknowledging and tackling hidden disparities to create comprehensive advocacy strategies. Nonprofits also played a crucial role in advocating for equitable resource distribution. By ensuring that funding and support were directed toward addressing economic disparities, organizations were able to improve the quality of life for those with greatest needs.

Ultimately, nonprofit leaders said the strategic integration of DEI principles into nonprofit advocacy efforts seemed to foster a more inclusive and just society. By empowering marginalized communities and ensuring their perspectives were central to policy discussions, nonprofits enhanced the authenticity and impact of their advocacy. The experiences of the nonprofits we interviewed demonstrate that, despite the challenges, a committed and strategic focus on DEI can lead to significant strides in creating inclusive and equitable advocacy strategies that better serve diverse communities.

?

Question 5:

How does the current partisan state of American politics in 2024 affect nonprofits?

The influence of the political environment on nonprofit activities, especially in terms of engagement in advocacy and lobbying, offers a fascinating lens through which to explore how organizations navigate the complexities of their external contexts. The findings from the 2022 PENS study illuminate the varying degrees of advocacy engagement among nonprofits across different political landscapes in the U.S.

In the 2022 PENS study, states were categorized into three types (blue, red, and purple) utilizing the Cook Political Report's 2020 classifications. As shown in Figure 4, findings in blue states, including solid Democrat states such as California and likely Democrat states such as Virginia, showed that approximately 34% of nonprofits engaged in policy discussions through lobbying and advocacy. This contrasted with the 27% of nonprofits in battleground (purple) states, such as Pennsylvania, and 29% in red states, including solid Republican states such as Tennessee and likely Republican states such as Missouri, engaging in similar activities. These distinctions suggest that the political climate of a state can significantly influence nonprofit behavior, potentially due to the perceived risks or benefits of advocacy in differing partisan environments.

FIGURE 4: ADVOCACY/LOBBYING ENGAGEMENT ACROSS STATES' POLITICAL ATMOSPHERES
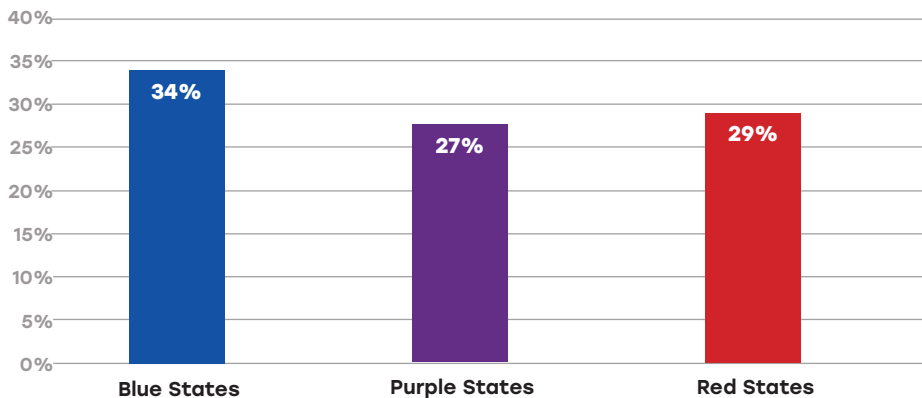
Source: Faulk et al. (2023).

A deeper exploration of the relationship between partisan politics and nonprofit engagement is still needed. Qualitative interviews with nonprofit leaders uncovered the sophisticated advocacy strategies organizations use to navigate their complex, often politically charged environments. Several prominent themes emerged regarding the impact of the current partisan state of American politics on nonprofit organizations in 2024.

1. Maintaining a bipartisan and nonpartisan stance is a strategic necessity.

In the current politically charged atmosphere, many organizations emphasized the importance of maintaining a bipartisan or nonpartisan stance, not merely as a philosophical commitment but as a strategic necessity. This stance allowed them to navigate the complexities of legislative environments, especially in states with a significant majority of one party. For instance, an executive director of the Southern Food Access and Nutrition Security Nonprofit highlighted the presence of an "ultra super majority" in its state legislature, which heavily influenced legislative agendas and policy-making processes. This dominance by one party necessitated a careful approach to policy advocacy to ensure the organization did not alienate potential supporters or legislators from either side of the political spectrum. A director who leads the organization described it as such:

> *"I think that it makes us much more careful about what policy pieces we jump on board with because we do want to be seen as a bipartisan organization. And because the fact of the matter is we have to work with people who see both ways on the ground."*

By emphasizing their commitment to bipartisanship, nonprofits aimed to project an image that transcended political divides, enabling them to work effectively with all stakeholders, regardless of their political affiliations. This approach seemed crucial in settings where political landscapes were sharply divided and where being perceived as overly aligned with one political ideology could have jeopardized their ability to influence policy, secure funding, or engage collaboratively with community partners.

Nonprofits appeared to strategically engage with policy issues that aligned with their core values, ensuring their advocacy efforts supported broad, inclusive goals rather than narrow partisan interests. This careful selection process helped strengthen nonprofits' reputations as balanced and committed to bipartisanship, which in turn facilitated more effective collaboration across the political spectrum. Such a stance may be beneficial not only for navigating the immediate political context but also for building long-term trust and credibility with a diverse range of stakeholders. A director of the Minnesota Emergency Housing Center, a small organization focused on community engagement and housing issues, described the importance of nonpartisanship in their policy involvement:

> *"There's always the concern of, we want to make sure that we're not excluding local community support or engagement because an issue appears to be a partisan issue that maybe they don't agree with. So keeping things nonpartisan, and that it's simply related to housing I think could be a barrier. And we want to be mindful of that."*

Nonprofit leaders expressed their frustration that the current divided political atmosphere and the negative impact of partisanship further drove them to take a bipartisan or nonpartisan stance. A leader of the Midwest Nonprofit for the Disabled explained the adverse effects of a hyper-partisan environment:

> *"… from the standpoint of people not getting along, it is maddening because it's almost like you can't have a conversation. We don't want to talk about politics anymore because people aren't talking with one another; we're talking at one another. The loudest voices are the ones that get heard, and sometimes the people we support don't have a voice, so in that instance, it's not great."*

This statement represents a common sentiment among many nonprofit leaders who work within or alongside legislative environments – that the current state of partisanship is not only unproductive but also detrimental to achieving any significant progress, regardless of the nonprofit subfield.

The qualitative interviews showed many nonprofit organizations strove to remain neutral and focused on their missions amid a backdrop of intense political rivalry, but they also faced complex realities. Partisan politics negatively affected the extent to which nonprofits could and would engage in advocacy work. Interviewees often described how political climate influenced whether they could advocate for certain policies without risking their nonprofit status or alienating stakeholders. Nonprofits reinforced the importance of their strategic commitment to bipartisanship, not only as a philosophical choice but also as a practical approach to navigating a landscape where progress increasingly depended on the ability to bridge deeply entrenched divides.

2. Nonprofits must carefully navigate policy engagement.

In the often-turbulent realm of nonprofit management, nonprofit leaders have to do an intricate dance to maintain a nonpartisan stance and engage effectively in advocacy work. Nonprofits had to carefully navigate the political landscape, ensuring their advocacy efforts did not inadvertently align too closely with any political faction, potentially leading to backlash or impacting their operational effectiveness. This cautious approach was underscored by fears of political retaliation and the need to protect public images and nonprofit status.

Nonprofit leaders explained that political retaliation was a real threat, especially when engagement with government officials involved politically charged issues. The fear that nonprofits harbored was not just about opposing political views but also about the potential consequences of being perceived as politically biased. They worried that such perceptions could lead to a reduction in funding, loss of support, or, worse, active retaliation that could impair their operations. The executive director of the Northeast Food Equity and Access Nonprofit articulated this concern vividly:

> *"One barrier or concern is political … This is extreme, but it's often seen in nonprofits, is political retaliation. So … nonprofits sometimes are afraid to engage with government officials because if what you are advocating for is politically charged – and some things are, some aren't. Sometimes it's hard to predict. As a nonprofit, you can be fearful that you might lose what you already have or … you may bring attention to something you don't want to bring attention to, and there could be some form of retaliation because of it."*

Some nonprofit leaders shared the existential worries tied to maintaining their IRS standing while engaging in advocacy. The fear of losing their nonprofit status loomed large whenever they considered supporting potentially contentious legislation or policies. The statement given by the leader of the Southern Food Access and Nutrition Security Nonprofit, which works toward creating local sustainable and resilient food systems, reflects the broader anxiety within the sector about crossing lines that could lead to legal consequences:

> *"We don't want to lose our IRS standing, but I definitely had political fears come to me with bills that they're working on and ask us to throw our weight behind it or ask us to generate a grassroots movement around a bill."*

Nonprofit leaders said they must strike a balance between influencing policy and maintaining the impartiality required to keep their nonprofit status intact.

Overall, the sentiments of the nonprofit leaders interviewed collectively illustrate the strategic approaches that nonprofits adopt to navigate the current political terrain. Nonprofits must continually assess the political implications of their selective advocacy efforts, weighing the benefits of engaging on certain issues against the risks of political backlash. This careful deliberation helps ensure they can continue to champion their causes without compromising their core mission or jeopardizing their crucial public support. Navigating this complex landscape requires not just keen awareness of the political climate but also a deep understanding of the potential impacts on their organizational integrity and public image.

3. Political dynamics create unpredictability for nonprofits, affecting their operational capabilities.

In the complex landscape of nonprofit management, organizations frequently encountered external pressures from the political environment that significantly influenced their funding and operations. These pressures manifested through changes in funding availability, government shutdowns, and policy shifts that directly affected service provision, all of which created unpredictable environments and impacted nonprofits' financial stability and operational capabilities.

One poignant example came from the executive at the Midwest Rehabilitative Service Provider, an organization that provides effective community-based correctional options addressing the needs of individuals involved in the criminal justice system through a continuum of care that includes prevention, intervention, and reintegration services:

> *" … sometimes [a government shutdown is] a result of partisan politics and can't agree to budgets or whatever. It doesn't shut us down, but what it does do is if they have a shutdown, they stop paying us. We're still required to provide services."*

This illustrates how government shutdowns, often a consequence of partisan disagreements over budget allocations, can severely impact the operational capacity of nonprofits, forcing them to continue their services without any financial support. The direct financial risks nonprofits face during political standoffs often disrupt their cash flow and place additional strains on their resources.

The executive director from the Midwest Cycling Organization highlighted the difficulties of operating under a divided government, which had stalled initiatives relevant to their mission:

> *"[Our state] had been one of those purple states with a divided government for a long time so nothing big got done as far as biking and walking. The Democrats are in control for the first time in more than a decade of both houses of the legislature."*

Based on these discussions, it was clear the composition of government can either stall or facilitate nonprofit activities depending on the political alignment and priorities of the ruling parties. In this case, a change in political control provided a new opportunity for advocacy and progress in areas that were previously stagnant.

Nonprofit leaders said they must navigate a landscape where political fluctuations can suddenly alter funding mechanisms and operational capacities. Such sudden changes illustrated the need for adaptability and resilience in nonprofit management.

Several nonprofit leaders mentioned how political uncertainty and shifting priorities exacerbated concerns regarding future funding and their ability to continue providing services. The executive director of the New Mexico Child and Family Service Provider, which provides comprehensive services to families experiencing homelessness or instability, stated:

> *"I do have many concerns depending on the next presidential election. I fear that programs like ours could be impacted greatly through funding sources when we've already seen so many successes in ways that we've helped families who would have remained unhoused or displaced or some who are experiencing drug addiction, some who are experiencing severe child abuse and neglect."*

The deeply partisan state of American politics has created substantial challenges for nonprofit organizations, particularly in terms of maintaining donor relationships and navigating the societal divisions that influence donor sentiments. Several nonprofits shared experiences that illustrate how their positions on contentious issues or the perception of their political affiliations led to a loss of donors, impacting their funding and operational capabilities. The Northeast Poverty Organization and Community Center executive director experienced firsthand the loss of donors due to political disagreements, particularly related to his perceived political stance and the organization's inclusive policies. He explained:

> *"I've lost donors because they've sleuthed out that I'm not a supporter of Trump … I've had churches write me notes asking, 'Where do you stand on this?' And I'd write back and tell them the truth: that we accept all people and we value all people. And then the next thing I know, the church throws that up on the bulletin board and I lose the donors that were conservative."*

Similarly, the leader of the California Youth-Focused Homeless Services Organization reflected on the complexities of engaging with donors in a partisan environment. They noticed a shift in the behavior of their donors who became more vocal and divided in their political opinions. This division affected the nonprofit's fundraising strategies and internal dynamics:

> *"Those private donors who give us money every year ... the last few years, certainly because of our political landscape, have brought out more vocal opinions and opposition to whatever government's in power."*

This introduced tensions internally as the organization strove to align its fundraising efforts with its mission while managing donor expectations and political sensitivities.

The Southern Child and Family Services Nonprofit manager recounted a specific incident following the murder of George Floyd that led to a decline in support from some donors. The organization chose to make a public statement, which received positive feedback from many, but it also resulted in the loss of funding from others who disagreed with the stance.

These statements collectively highlight the sentiments widely shared by many interviewees regarding how the partisan state of American politics can distract nonprofits from their primary missions by forcing them to navigate the complex and often divisive landscape of donor expectations and political sensitivities. They emphasized the need for careful communication and management of donor relationships, as organizations must balance expressing their core values and maintaining necessary funding sources in an increasingly polarized environment.

Nonprofit leaders were concerned their funding and service provision capacity could fluctuate depending on the political situation, and such concerns made them less likely to engage in advocacy and decreased their capacity to advocate for the causes they support. Leaders knew they needed to keep the government support they heavily rely on, which may have made them wary of advocating in the face of a changing political environment.
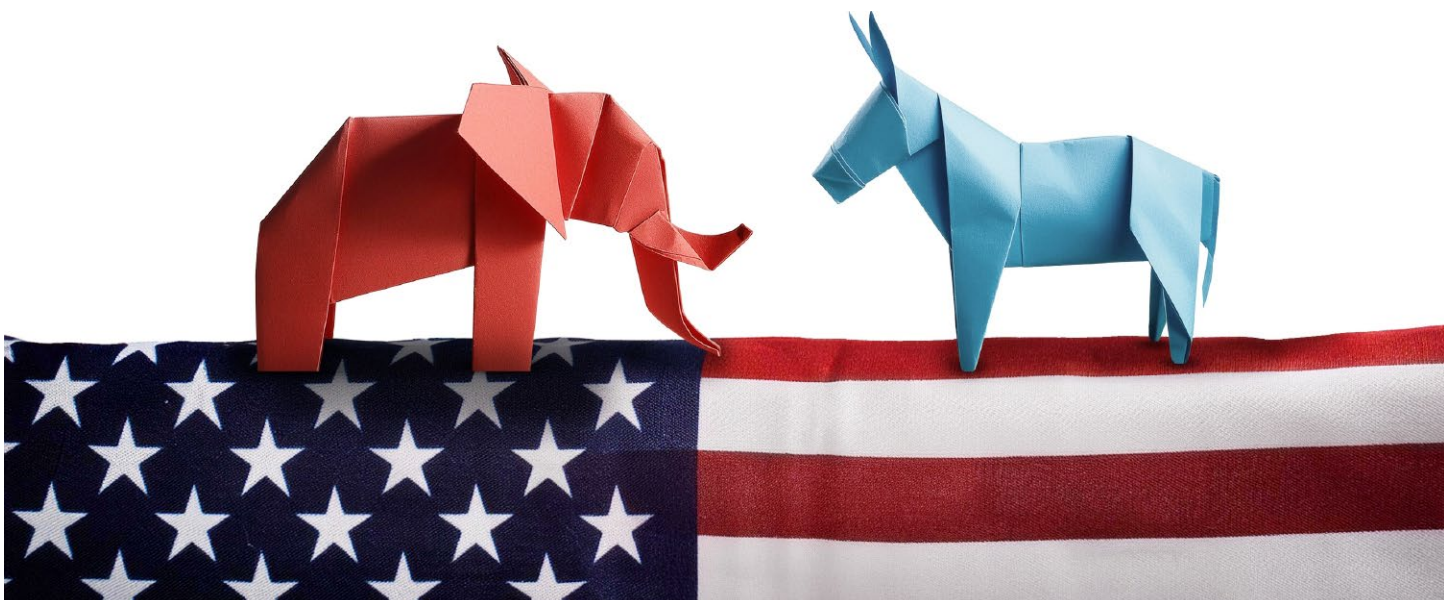
4. The increasingly polarized landscape of American politics may distract nonprofits from their core missions.

In the increasingly polarized landscape of American politics, nonprofit organizations often find themselves navigating a minefield of partisan issues that can distract from their core missions. The political environment profoundly influences strategic decisions within organizations, particularly in terms of selecting which issues to address and determining the intensity with which to pursue certain objectives. One significant aspect of this polarization is how nonprofit organizations may shift their focus based on prevailing political winds or the potential for garnering support.

Nonprofit leaders found themselves adjusting their strategies to align with or adapt to the current political climate, which could either open opportunities or impose constraints on their operations. For instance, one interviewee from the Delaware Neighborhood Human Services Organization noted how long-standing polarization resulted in divergent attitudes toward poverty in blue and red states:

> *"... this polarization thing has been going on for a long time. There's just a different attitude towards the causes and solutions to poverty in blue states than in red states that I've seen."*

The political leanings of a state can influence a nonprofit's approach to addressing issues such as poverty, forcing them to make their strategies align with the local political climate and societal attitudes.

The executive director of the Debate Club for K3–12 described how they have to navigate local urban politics. They emphasized how partisan dynamics affected their internal programming decisions:

> *"It impacts it so much for several reasons. I think the partisan energy tendency, we're seeing that in our young people, so it's pushing us to do programs differently internally so that we are actually making sure we're arguing about the issue, not the person. We're not making this a personal attack ... We did receive less funding when Trump was in office. I mean, I know that it's a cycle, but it didn't rebound, not automatically. It didn't rebound to the same level that it had been before. So absolutely, we do feel it, no question."*

Several interviewees gave similar examples regarding how the political climate directly affected their strategic planning and operational adjustments.

Further, organizations reported facing internal dilemmas when engaging with politically charged topics. The fear of negative public relations outcomes or unintended consequences deterred organizations from addressing certain issues. This reflects the internal challenges organizations confront in navigating politically sensitive subjects without alienating parts of their audience or stakeholders, demonstrating the delicate balance between mission-driven advocacy and maintaining broad-based support.

The experience of Arizona Family Resource Center speaks to the internal debates that often arise within organizations regarding issue prioritization and strategic focus. The executive director's push to integrate reproductive health into their service offerings, based on his background and understanding of its

connection to children's well-being, met internal resistance. The concerns were not about the relevance of the issue, but rather about the organization's capacity and strategic focus. This illustrates the internal conflicts that can arise when nonprofits expand into new, politically sensitive areas. He remarked:

> *" … we're operating in small communities in addition to the big cities of Arizona, so we have 13, 14 offices … I come from a background of being a former Planned Parenthood board member, and I really understand this connection between children's well-being and family planning. And I early on was advocating for more strongly endorsing, not just now in the midst of the crisis, but four, five, eight years ago, how active should we be in the reproductive rights space? And I had some pushback about, 'Not that we disagree with you, but it's just we got plenty on our plate. This is probably not our fight, or not our work.'"*

The leader of the Minnesota Emergency Housing Center provided a vivid illustration of how a charged political climate can make engaging with certain topics perilous. They noted that the divisive nature of politics made it daunting to address issues that could be perceived as politically charged, such as immigration:

> *"It kind of goes back to maybe that conspiracy theory group, where it just makes everything a little bit scarier when it's political to address … It feels like everything is charged on one side or the other, where it's like there's no middle ground anymore."*

This sentiment reflects how political polarization can turn even the most humanitarian of issues into battlegrounds, detracting from the actual needs of vulnerable populations.

Similarly, the leader from the California Immigrant Legal Services Organization, which operates in a highly partisan environment, shared concerns about how partisanship hampered their ability to openly discuss and advocate on sensitive issues. One example given was the interpretation of a social media post about Israel and Palestine, which was misconstrued due to prevailing partisan perspectives. An interviewee noted:

> *"The interesting thing about the partisan politics is what it does is it hampers our capacity to talk about issues … the more polarized we are as Americans, the harder it is for us to have an open conversation about topics."*

These examples show how essential dialogues can be stifled in partisan environments, affecting nonprofits' abilities to engage in effective advocacy.

Another organization provided a contrasting scenario where their focus on community gardening and local food systems was generally viewed as non-divisive and enjoyed bipartisan support. However, they too were not immune to the challenges posed by current partisan perspectives, especially when discussing programs that intersected with sensitive social issues like homelessness. The organization described a situation in a Midwestern city where a program aimed at providing free food to the houseless was criticized by some public officials as enabling homelessness.

Leaders were concerned about how operating in an environment where even non-divisive activities can become contentious will potentially impact the reception and success of well-intended programs.

These examples underscore the complexities nonprofits face in politically charged atmospheres, where addressing real, pressing needs often takes a backseat to navigating the divisive political landscape. Nonprofit leaders explained how this environment not only hampers straightforward advocacy and policy engagement but also complicates the public perception and operational execution of programs designed to aid the most vulnerable. The challenge for nonprofits is to find ways to transcend these barriers, maintaining focus on their missions while adapting to the realities of the partisan dynamics that shape their current operating contexts.

Altogether, these statements demonstrate how nonprofit leaders navigated the complex interplay of external political pressures and internal organizational dynamics. This balancing act was crucial for sustaining their operations and making impactful contributions to the communities they serve. Their experiences indicate that the partisan state of politics deeply permeates organizational strategies, operations, and missions, especially in sectors closely tied to government funding, policy advocacy, and public service.

Conclusion

The current state of partisan politics in the U.S. presents significant challenges for nonprofit organizations, affecting their ability to focus on their core missions. Nonprofits must navigate an increasingly polarized landscape that influences their strategic decisions, operational adjustments, and advocacy efforts. The political environment forces these organizations to constantly adapt, often leading to shifts in focus and strategy that align with the prevailing political winds or the need to garner support.

Several key themes emerged from the interviews with nonprofit leaders regarding how partisan politics affects nonprofits. First, maintaining a bipartisan or nonpartisan stance was not just a philosophical commitment but a strategic necessity. Nonprofits had to carefully choose their advocacy efforts to avoid alienating potential supporters or legislators, especially in politically divided states. This strategic approach allowed them to work effectively across the political spectrum, ensuring continued influence and support.

Second, nonprofits faced internal dilemmas when dealing with politically charged topics. Fear of negative public relations outcomes and unintended consequences deterred them from addressing certain issues, creating a delicate balance between mission-driven advocacy and maintaining broad-based support. The internal conflicts that arose when expanding into new, politically sensitive areas further complicated their operations.

Moreover, the politically charged atmosphere made engaging with certain topics perilous. Organizations had to navigate a complex landscape where even non-divisive activities became contentious, potentially impacting the success of well-intended programs. This environment hampered straightforward advocacy and policy engagement, complicating public perception and operational execution.

In conclusion, the partisan state of American politics deeply permeates the strategies, operations, and missions of nonprofit organizations. These organizations must continuously adapt to an ever-changing political environment while maintaining a cohesive internal stance aligned with their core missions. This balancing act is crucial for sustaining their operations and making impactful contributions to the communities they serve. Nonprofits must find ways to transcend political barriers, ensuring their focus remains on addressing the real, pressing needs of vulnerable populations amid the complexities of a polarized political landscape.

Discussion

Nonprofit organizations play a fundamental role in American democracy. The nonprofit leaders we interviewed provided insights into various issues their organizations face when making decisions about advocacy and lobbying. Whether advocating for their clients daily, lobbying for policies at multiple government levels, engaging in coalitions to support their constituents, or leading nonpartisan get-out-the-vote efforts, nonprofit organizations are on the front lines. They amplify the voices of marginalized populations underserved by the political system and advocate for equitable policies that benefit both their constituents and the sector as a whole. In short, they are vital representatives for the people and communities they serve. Here, we briefly review our research questions and discuss several cross-cutting issues that emerged in our conversations with nonprofit leaders.

Answering Our Research Questions

How do nonprofits define advocacy?

Nonprofit leaders defined advocacy broadly. Their descriptions sometimes revealed a lack of familiarity with legal regulations regarding advocacy and lobbying. Most often, executive directors spoke of "advocating for the people they serve," which did not always involve policy – sometimes it was advocating for individual clients to get the services they needed and other times it was raising greater awareness of their clients' lived experiences. However, for many nonprofits, advocacy does include a policy dimension. Further probing showed that some nonprofits are more sophisticated advocates than others, actively lobbying for their clients and organizations. Mission serves as the "north star" of nonprofit advocacy, guiding leaders to focus on their strengths or "stay in their lane." Nonprofit leaders described advocacy as amplifying their clients' voices and identified advocacy success as seeing tangible outcomes for the people and communities they serve.

What are the greatest barriers to nonprofit engagement in advocacy or policy conversations? How do nonprofits work to overcome them?

Our conversations with nonprofit leaders revealed their deep commitment to the people and communities they serve, despite facing substantial barriers to advocacy. The most significant barriers identified were limited capacity, time, and resources, all of which hampered their ability to successfully deliver direct services while engaging in advocacy to change the underlying systemic problems their clients faced. Importantly, many nonprofit leaders said they either did not fully understand the confusing legal regulations around nonprofit advocacy or know how to engage with policymakers, even if they recognized the importance of doing so. Executive directors highlighted government support, strategic support from the board of directors, and coalitions as ways to overcome these challenges – in addition to the importance of trial and error and learning by doing, especially to build expertise over time.

Do nonprofits think the government generally supports their missions? How so?

Executive directors generally viewed government support as providing funding. However, others emphasized the importance of policies and regulations that affect their clients and operations. Many nonprofit leaders expressed a desire for "a seat at the table" to represent their interests in policy decisions impacting nonprofits. Responsiveness by government and elected officials was an important condition for advocacy engagement. While most leaders felt at least partially supported by the government, some remained skeptical, citing insufficient funding, weak policy support, or an unwillingness to engage nonprofits in identifying policy solutions to problems their clients faced. Nonprofit leaders indicated that building relationships with government officials and their staff was a key strategy to enhance government support.

How do diversity, equity, and inclusion (DEI) issues matter for nonprofit advocacy work?

Most nonprofit leaders embraced DEI initiatives but faced challenges integrating them into their advocacy efforts, including navigating political sensitivities and overcoming internal resistance. Many managers described creative ways to overcome these barriers. Executive directors said they believed that nonprofit advocacy is more successful when it addresses the diverse needs of their communities, especially when their clients have opportunities to tell their own stories. The most successful nonprofits also described the importance of including people with lived experience on their boards and staff and among their volunteers to reflect the diversity of the communities they serve. Ultimately, we found that DEI principles and advocacy went hand in hand: organizations that were most active in policy advocacy described practices and an ethos of diversity and representation throughout their work.

How does the current partisan state of American politics in 2024 affect nonprofits?

This research took place during an unprecedented time of partisanship and rancor in American politics. Nonprofit leaders generally were acutely aware of this political context and its impact on their advocacy efforts. Many executive directors underscored the importance of framing their work as bipartisan and nonpartisan to various stakeholders, including government representatives and nonprofit donors. Leaders also approached their work through a bipartisan and nonpartisan lens, even when they individually leaned in a particular political direction or when they were obviously frustrated with the dominant political perspectives in their local or state government. As some explained, the prevailing partisanship and political polarization of the time pushed them to take careful, strategic approaches to identifying causes to champion, and to base their decisions firmly on their mission and the importance of the cause for the people they serve.

Cross-Cutting Themes About Advocacy

Several cross-cutting themes emerged in our discussions with nonprofit leaders across multiple topics that guided the conversations. These themes came up across various questions we raised during the interviews concerning advocacy definitions, advocacy barriers, government support, DEI, and partisan politics.

Relationships are central to advocacy

Executive directors emphasized the importance of building and maintaining strong relationships to effectively conduct their advocacy work. They identified relationships with various actors – other nonprofits, clients, volunteers, board members, government representatives, and leaders – as essential to their advocacy efforts. These connections provide nonprofits with access to resources, information, allies, and venues they might not otherwise have. Nonprofit leaders are flexible in establishing and maintaining relationships, sometimes relying on the strength of weak ties or informal connections with others who can link them to resources. This might include participating in coalitions that require minimal commitment but offer significant returns in information-sharing and representation. In other instances, nonprofit leaders are particularly strategic, identifying and cultivating strong relationships with people and organizations with influence. Relationships with other organizations and coalitions also inform and motivate nonprofit leaders to engage in advocacy. Many nonprofit managers highlighted the importance of promoting an advocacy culture among stakeholders in the nonprofit sector. A culture of active engagement in policy discussions, supported through relationships, helps nonprofits become more informed and aware of the importance of advocacy and how they can stay engaged.

Having a "seat at the table" is important to advocacy

Nonprofit leaders repeatedly emphasized the importance of having a seat at the table to overcome advocacy hurdles and strengthen government support for the sector. Nonprofits need opportunities to provide input and offer their expertise when important policy and executive decisions affecting them are made. Executive directors highlighted the benefits of a respectful relationship with government, where their deep on-the-ground knowledge is brought into policy discussions. Having a seat at the table can facilitate nonprofit engagement on various issues, from shaping new funding streams and weighing in on regulations to solving emerging problems government agencies find themselves facing. When nonprofit leaders have such a seat, they take on a representative role in ongoing consultations with public officials, marked by the exchange of information, data, and resources. Having a seat at the table means being a regular and respected part of the policy conversation, and it also implies a welcome invitation from government officials to engage in policy and government decisions that directly impact nonprofits and those they serve. This helps nonprofits overcome the barrier of not knowing where to start. Overall, the interview findings highlight the need for government to bring nonprofit leaders to the decision-making table rather than thinking of them as mere recipients of government decisions.

Advocacy should seek empowerment through representation

Nonprofit managers often emphasized the importance of representation when advocating for consequential issues. They identified it as a key element of successful advocacy, discussing the need to "lift up" the voices of their clients. Some nonprofit leaders stressed the importance of involving clients as partners in advocacy, allowing nonprofits to speak both for and with the people they serve. Representation and empowerment are also crucial to DEI engagement in nonprofits' advocacy and other work. Having a nonprofit workforce and leadership that reflect the communities they serve was seen as essential for achieving effective outcomes. These discussions highlight the critical role of representation and client empowerment in nonprofit advocacy. By directly involving clients and ensuring their voices are heard, nonprofits can advocate more effectively for equitable policies. The ongoing effort to incorporate DEI practices into advocacy underscores nonprofit leaders' commitment to achieving justice and equity for the communities they serve.

Advocacy coalitions play important roles

Nonprofit leaders identified advocacy coalitions as a key strategy for overcoming barriers, whether related to advocacy itself or to the current partisan policy environment. Resource-strapped nonprofits relied on coalitions for information, networks, and training. Managers revealed varying levels of engagement with coalitions. Some executive directors described taking leadership positions or initiating coalition formation for advocacy purposes. For others, participation was more modest, such as signing a coalition letter to support or oppose a policy. Many referenced advocacy coalitions when discussing the importance of relationships in nonprofit advocacy. For some leaders, coalitions also served as a way to learn new strategies and educate important stakeholders such as board members and donors about advocacy. These insights underscore the important role that advocacy coalitions play in empowering nonprofits to navigate the challenges of a partisan policy environment. Coalitions provide essential resources and networks, foster leadership, and promote collaborative efforts among nonprofit leaders. Ultimately, advocacy coalitions emerge as a vital strategy for enhancing the efficacy and impact of nonprofit advocacy efforts.

Nonprofit advocates are persistent

When describing their advocacy, executive directors often explained their strategy of "waiting them out." Many nonprofit leaders shared stories of policy wins achieved after a change in political leadership, following long periods of persistent advocacy. Nonprofit managers recognized that the policy cycle is linked to the election cycle. Sometimes leadership changes were related to elections, but other times they resulted from government agency restructuring or retirements. These shifts opened doors to advocacy success. These accounts illustrate the strategic patience and persistence of nonprofit leaders who capitalize on changes in political leadership. They emphasize how nonprofits act as policy entrepreneurs, ready to seize opportunities from changes in leadership or organizational restructuring. This readiness and adaptability are key to nonprofit success in achieving long-term policy goals.

Understanding the Current State of Nonprofit Advocacy

This qualitative study of nonprofit advocacy was an important complement to the PENS study. Our conversations with nonprofit human services leaders provided rich descriptions of many aspects of their advocacy efforts. While this report answers many questions, it also raises new ones.

Future research should investigate the relationship between nonprofit advocacy and political environments in greater detail. As our conversations with nonprofit leaders about partisan politics showed, the effect of the current political environment is significant. With the current variability in state policy arenas, it is important to understand how engagement looks in different contexts that either facilitate or hinder nonprofit advocacy. Future research should also explore the role of coalitions in nonprofit advocacy, examining how these collaborative efforts impact individual nonprofits and shape their advocacy and civic engagement.

Conclusion

Nonprofits reported that maintaining a bipartisan or nonpartisan stance was not just a philosophical commitment but a strategic necessity. This balancing act is crucial for sustaining nonprofit operations and making impactful contributions to the communities they serve.

This qualitative report has described how nonprofit organizations play an indispensable role in American democracy, advocating for marginalized populations and promoting equitable policies. Our qualitative study, alongside the 2022 PENS study, provides a comprehensive understanding of the challenges and strategies in nonprofit advocacy.

Nonprofit leaders are deeply committed to their communities, but they are navigating substantial challenges such as limited capacity, time, and expertise. They emphasize the importance of relationships, coalition work, and having a "seat at the table" to effectively influence policy decisions that matter to their nonprofits and people they serve. Representation and empowerment, particularly in the context of DEI, are crucial for successful advocacy efforts, ensuring that the voices of those they serve are heard and valued.

The current political climate, marked by heightened partisanship and polarization, necessitates a careful and strategic approach to advocacy. Nonprofit leaders must appear bipartisan or nonpartisan, tailoring their messages to resonate with diverse stakeholders. The persistence and adaptability of nonprofit advocates, coupled with their ability to form and leverage coalitions, underscore their resilience and effectiveness in achieving long-term policy goals.

These findings call for additional research to understand the dynamic relationship between nonprofit advocacy and political environments, exploring how different contexts can either facilitate or hinder advocacy efforts. Moreover, the important role of coalitions in enhancing nonprofit advocacy described in this report suggests further examination of advocacy in terms of nonprofit development and life cycles. By continuing to investigate these areas, we can better understand and support the vital work of nonprofits in advocating for justice, equity, and positive social change, as well as the infrastructure needed to maximize nonprofit voice in policy processes.

References

Alexander, J., Nank, R., & Stivers, C. (1999). Implications of welfare reform: Do nonprofit survival strategies threaten civil society? *Nonprofit and Voluntary Sector Quarterly*, 28(4), 452–475. **https://doi.org/10.1177/0899764099284005**

Andrews, K. T., & Edwards, B. (2004). Advocacy organizations in the U.S. political process. *Annual Review of Sociology*, 30, 479–506.

Bass, G., Arons, D., Guinane, K., Carter, M., & Rees, S. (2007). *Seen but Not Heard: Strengthening Nonprofit Advocacy*. The Aspen Institute.

Beaton, E., MacIndoe, H., & Wang, T. (2021). Combining nonprofit service and advocacy: Organizational structures and hybridity. *Nonprofit and Voluntary Sector Quarterly*, 50(2), 372–396. **https://doi.org/10.1177/0899764020959477**

Berry, J. M. (2005). Nonprofits and civic engagement. Public Administration Review, 65(5), 568–578. **https://doi.org/10.1111/j.1540-6210.2005.00484.x**

Berry, J. M., & Arons, D. F. (2003). *A Voice for Nonprofits*. Brookings Institution Press.

Boris, E. T., Maronick, M., & Nikolova, M. (2014). Shaping the government-nonprofit partnership: Direct and indirect advocacy. In R. J. Pekkanen, S. R. Smith, & Y. Tsujinaka (Eds.), *Nonprofits and Advocacy: Engaging Community and Government in an Era of Retrenchment*. Johns Hopkins University Press.

Boris, E., & Mosher-Williams, R. (1998). Nonprofit advocacy organizations: assessing the definitions, classifications, and data research notes. *Nonprofit and Voluntary Sector Quarterly*, 27(4), 488–506. **https://heinonline.org/HOL/P?h=hein.journals/npvolsq27&i=468**

Bradshaw, P., & Fredette, C. (2013). Determinants of the range of ethnocultural diversity on nonprofit boards: A study of large Canadian nonprofit organizations. *Nonprofit and Voluntary Sector Quarterly*, 42(6), 1111–1133. **https://doi.org/10.1177/0899764012453085**

Brown, W. A. (2002). Racial diversity and performance of nonprofit boards of directors. *The Journal of Applied Management and Entrepreneurship*, 7(4), 43–57.

Buffardi, A. L., Pekkanen, R. J., & Smith, S. R. (2015). Shopping or specialization? Venue targeting among nonprofits engaged in advocacy. *Policy Studies Journal*, 43(2), 188–206. **https://doi.org/10.1111/psj.12090**

Calderon, M. A., Chand, D. E., & Hawes, D. P. (2021). Final lines of defense: Explaining policy advocacy by immigrant-serving organizations. *Nonprofit Policy Forum*, 12(2), 285–310. **https://doi.org/10.1515/npf-2020-0023**

Cheng, Y., Yang, L., & Deng, S. (2022). Nonprofit density and distributional equity in public service provision: Exploring racial/ethnic disparities in public park access across U.S. cities. *Public Administration Review*, 82(3), 473–486. **https://doi.org/10.1111/puar.13465**

Child, C. D., & Grønbjerg, K. A. (2007). Nonprofit advocacy organizations: Their characteristics and activities. *Social Science Quarterly*, 88(1), 259–281. **https://doi.org/10.1111/j.1540-6237.2007.00457.x**

Chin, J. J. (2018). Service-providing nonprofits working in coalition to advocate for policy change. *Nonprofit and Voluntary Sector Quarterly*, 47(1), 27–48. **https://doi.org/10.1177/0899764017721060**

Clear, A., Paull, M., & Holloway, D. (2018). Nonprofit advocacy tactics: Thinking inside the box? *VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations*, 29(4), 857–869. **https://doi.org/10.1007/s11266-017-9907-4**

Devita, C. J., Nikolova, M., & Roeger, K. L. (2014). Nonprofit advocacy in the nation's capital. In R. J. Pekkanen, S. R. Smith, & Y. Tsujinaka (Eds.), *Nonprofits and Advocacy: Engaging Community and Government in an Era of Retrenchment* (pp. 85–106). Johns Hopkins University Press.

Donaldson, L. P. (2007). Advocacy by nonprofit human service agencies. *Journal of Community Practice*, 15(3), 139–158. **https://doi.org/10.1300/J125v15n03_08**

Faulk, L. Kim, M., & MacIndoe, H. (2023). *The Retreat of Influence: Exploring the Decline of Nonprofit Advocacy and Public Engagement*. Independent Sector. **https://independentsector.org/policy/advocacy-research/**

Fredette, C., & Bernstein, S. R. (2019). Ethno-racial diversity on nonprofit boards: A critical mass perspective. *Nonprofit and Voluntary Sector Quarterly*, 48(5), 931–952. **https://doi.org/10.1177/0899764019839778**

Fyall, R., & Allard, S. W. (2017). Nonprofits and political activity: A joint consideration of the political activities, programs, and organizational characteristics of social service nonprofits. *Human Service Organizations: Management, Leadership & Governance*, 41(3), 275–300. **https://doi.org/10.1080/23303131.2016.1267054**

Fyall, R., & McGuire, M. (2015). Advocating for policy change in nonprofit coalitions. *Nonprofit and Voluntary Sector Quarterly*, 44(6), 1274–1291. **https://doi.org/10.1177/0899764014558931**

Gazley, B., Chang, W. K., & Bingham, L. B. (2010). Board diversity, stakeholder representation, and collaborative performance in community mediation centers. *Public Administration Review*, 70(4), 610–620. **https://www.jstor.org/stable/40802238**

Glass, L. E. (2022). A change in regime: Examining diversity theater and racial inequality at an education nonprofit. *Ethnic and Racial Studies*, 45(15), 2892–2912. **https://doi.org/10.1080/01419870.2022.2041207**

Gleeson, S., & Bloemraad, I. (2013). Assessing the scope of immigrant organizations: Official undercounts and actual underrepresentation. *Nonprofit and Voluntary Sector Quarterly*, 42(2), 346–370. **https://doi.org/10.1177/0899764011436105**

Grasse, N., Ward, K. D., & Miller-Stevens, K. (2021). To lobby or not to lobby? Examining the determinants of nonprofit organizations taking the IRS 501(h) election. *Policy Studies Journal*, 49(1), 242–267. **https://doi.org/10.1111/psj.12349**

Guo, C., & Musso, J. A. (2007). Representation in nonprofit and voluntary organizations: A conceptual framework. *Nonprofit and Voluntary Sector Quarterly*, 36(2), 308–326. **https://doi.org/10.1177/0899764006289764**

Guo, C., & Saxton, G. D. (2010). Voice-in, voice-out: Constituent participation and nonprofit advocacy. *Nonprofit Policy Forum*, 1(1). **https://doi.org/10.2202/2154-3348.1000**

Guo, C., & Zhang, Z. (2014). Understanding nonprofit advocacy in non-western settings: A framework and empirical evidence from Singapore. *VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations*, 25(5), 1151–1174. **https://doi.org/10.1007/s11266-014-9468-8**

Harris, E. E. (2014). The impact of board diversity and expertise on nonprofit performance. *Nonprofit Management and Leadership*, 25(2), 113–130. **https://doi.org/10.1002/nml.21115**

Holyoke, T. T., Henig, J. R., Brown, H., & Lacireno-Paquet, N. (2007). Institution advocacy and the political behavior of charter schools. *Political Research Quarterly*, 60(2), 202–214. **https://doi.org/10.1177/1065912907301808**

Howlett, M. (2022). Looking at the 'field' through a Zoom lens: Methodological reflections on conducting online research during a global pandemic. *Qualitative Research*, 22(3), 387–402. **https://doi.org/10.1177/1468794120985691**

Hung, C.-K. R. (2007). Immigrant nonprofit organizations in U.S. metropolitan areas. *Nonprofit and Voluntary Sector Quarterly*, 36(4), 707–729. **https://doi.org/10.1177/0899764006298962**

Independent Sector. (2023). *Health of the U.S. Nonprofit Sector: Annual Review November 2023*. **https://independentsector.org/wp-content/uploads/2023/11/2023-Health-of-the-U.S.-Nonprofit-Sector-Annual-Review.pdf**

Internal Revenue Service. (2024a). Lobbying. **https://www.irs.gov/charities-non-profits/lobbying**

Internal Revenue Service. (2024b). Measuring Lobbying Activity: Expenditure Test. **https://www.irs.gov/charities-non-profits/measuring-lobbying-activity-expenditure-test**

Kim, M., & Li, B. (2023). Financial challenges of nonprofits serving people of color: Original survey results. *Nonprofit and Voluntary Sector Quarterly*, 52(5), 1145–1168. **https://doi.org/10.1177/08997640221122812**

Kim, M., & Mason, D. P. (2018). Representation and diversity, advocacy, and nonprofit arts organizations. *Nonprofit and Voluntary Sector Quarterly*, 47(1), 49–71. **https://doi.org/10.1177/0899764017728364**

Leech, B. L. (2006). Funding faction or buying silence? Grants, contracts, and interest group lobbying behavior. *Policy Studies Journal*, 34(1), 17–35. **https://doi.org/10.1111/j.1541-0072.2006.00143.x**

LeRoux, K. (2007). Nonprofits as civic intermediaries: The role of community-based organizations in promoting political participation. *Urban Affairs Review*, 42(3), 410–422. **https://doi.org/10.1177/1078087406292257**

Leroux, K., & Goerdel, H. T. (2009). Political advocacy by nonprofit organizations. *Public Performance & Management Review*, 32(4), 514–536. **https://doi.org/10.2753/PMR1530-9576320402**

Li, H., Lo, C. W.-H., & Tang, S.-Y. (2017). Nonprofit policy advocacy under authoritarianism. *Public Administration Review*, 77(1), 103–117. **https://doi.org/10.1111/puar.12585**

Lindsay, S. (2022). A comparative analysis of data quality in online Zoom versus phone interviews: An example of youth with and without disabilities. *Sage Open*, 12(4). **https://doi.org/10.1177/21582440221140098**

MacIndoe, H., & Beaton, E. (2019). Friends or foes? How managerial perceptions of the political opportunity structure shape nonprofit advocacy. *Public Performance & Management Review*, 42(1), 59–89. **https://doi.org/10.1080/15309576.2018.1498362**

MacIndoe, H., & Whalen, R. (2013). Specialists, generalists, and policy advocacy by charitable nonprofit organizations. *The Journal of Sociology & Social Welfare*, 40(2). **https://scholarworks.wmich.edu/jssw/vol40/iss2/8**

Marwell, N. P. (2004). Privatizing the welfare state: Nonprofit community-based organizations as political actors. *American Sociological Review*, 69(2), 265–291. **https://doi.org/10.1177/000312240406900206**

Mason, D. P. (2015). Advocacy in nonprofit organizations: A leadership perspective. *Nonprofit Policy Forum*, 6(3), 297–324. **https://doi.org/10.1515/npf-2014-0036**

Mellinger, M. (2014). Beyond legislative advocacy: Exploring agency, legal, and community advocacy. *Journal of Policy Practice*, 13(1), 45–58. **https://doi.org/10.1080/15588742.2013.855887**

Mellinger, M., & Kolomer, S. (2013). Legislative advocacy and human service nonprofits: What are we doing? *Journal of Policy Practice*, 12(2), 87–106. **https://doi.org/10.1080/15588742.2013.766551**

Mosley, J. E. (2010). Organizational resources and environmental incentives: Understanding the policy advocacy involvement of human service nonprofits. *Social Service Review*, 84(1), 57–76. **https://doi.org/10.1086/652681**

Mosley, J. E. (2012). Keeping the lights on: How government funding concerns drive the advocacy agendas of nonprofit homeless service providers. *Journal of Public Administration Research & Theory*, 22(4), 841–866. **https://doi.org/10.1093/jopart/mus003**

Mosley, J. E. (2013). The beliefs of homeless service managers about policy advocacy: Definitions, legal understanding, and motivations to participate. *Administration in Social Work*, 37(1), 73–89. **https://doi.org/10.1080/03643107.2012.656221**

Mosley, J. E. (2014). From skid row to the statehouse: How nonprofit homeless service providers overcome barriers to policy advocacy involvement. In R. J. Pekkanen, S. R. Smith, & Y. Tsujinaka (Eds.), *Nonprofits and Advocacy: Engaging Community Government in an Era of Retrenchment* (pp. 107–136). John Hopkins University Press.

Mosley, J. E., & Ros, A. (2011). Nonprofit agencies in public child welfare: Their role and involvement in policy advocacy. *Journal of Public Child Welfare*, 5(2–3), 297–317. **https://doi.org/10.1080/15548732.2011.566789**

Mumford, S. (2022). Doing more with less: Racial diversity in nonprofit leadership and organizational resilience. *Journal of Public and Nonprofit Affairs*, 8(1), 29–57. **https://doi.org/10.20899/jpna.8.1.29-57**

Nicholson-Crotty, J. (2007). Politics, policy, and the motivations for advocacy in nonprofit reproductive health and family planning providers. *Nonprofit and Voluntary Sector Quarterly*, 36(1), 5–21. **https://doi.org/10.1177/0899764006291778**

Nicholson-Crotty, J. (2009). The stages and strategies of advocacy among nonprofit reproductive health providers. *Nonprofit and Voluntary Sector Quarterly*, 38(6), 1044–1053. **https://doi.org/10.1177/0899764009332467**

Nicholson-Crotty, J. (2011). Nonprofit organizations, bureaucratic agencies, and policy: Exploring the determinants of administrative advocacy. *The American Review of Public Administration*, 41(1), 61–74. **https://doi.org/10.1177/0275074009359681**

Noor, Z., Wasif, R., Siddiqui, S., & Khan, S. (2022). Racialized minorities, trust, and crisis: Muslim-American nonprofits, their leadership and government relations during COVID-19. *Nonprofit Management and Leadership*, 32(3), 341–364. **https://doi.org/10.1002/nml.21486**

Nyland, J. (1995). Issue networks and nonprofit organizations. *Review of Policy Research*, 14(1–2), 195–204. **https://doi.org/10.1111/j.1541-1338.1995.tb00632.x**

Oliffe, J. L., Kelly, M. T., Gonzalez Montaner, G., & Yu Ko, W. F. (2021). Zoom interviews: Benefits and concessions. *International Journal of Qualitative Methods*, 20. **https://doi.org/10.1177/16094069211053522**

Onyx, J., Armitage, L., Dalton, B., Melville, R., Casey, J., & Banks, R. (2010). Advocacy with gloves on: The "manners" of strategy used by some third sector organizations undertaking advocacy in NSW and Queensland. *VOLUNTAS: International Journal of Voluntary & Nonprofit Organizations*, 21(1), 41–61. **https://doi.org/10.1007/s11266-009-9106-z**

Patraporn, R. V., Pfeiffer, D., & Ong, P. (2010). Building bridges to the middle class: The role of community-based organizations in Asian American wealth accumulation. *Economic Development Quarterly*, 24(3), 288–303. **https://doi.org/10.1177/0891242410366441**

Pekkanen, R. J., & Smith, S. R. (2014). Nonprofit advocacy in Seattle and Washington, DC. In R. J. Pekkanen, S. R. Smith, & Y. Tsujinaka (Eds.), *Nonprofits and Advocacy: Engaging Community and Government in an Era of Retrenchment*. Johns Hopkins University Press.

Prentice, C. R. (2016). The "state" of nonprofit lobbying research: Data, definitions, and directions for future study. *Nonprofit and Voluntary Sector Quarterly*, 47(4_suppl), 204S–217S. **https://doi.org/10.1177/0899764018758957**

Reckhow, S. (2009). The distinct patterns of organized and elected representation of racial and ethnic groups. *Urban Affairs Review*, 45(2), 188–217. **https://doi.org/10.1177/1078087409331933**

Reid, E. J. (1999). Nonprofit advocacy and participation. In E. T. Boris & C. E. Steuerle (Eds.), *Nonprofits and Government: Collaboration and Conflict* (1st Edition, pp. 291–325). Urban Institute.

Riegel, S. M., & Mumford, S. W. (2022). Barriers to charitable nonprofit access and advocacy amid a pandemic: A case study of the Louisiana state legislature. *Nonprofit Policy Forum*, 13(2), 91–118. **https://doi.org/10.1515/npf-2021-0016**

Roth, B. J., Gonzales, R. G., & Lesniewski, J. (2015). Building a stronger safety net: Local organizations and the challenges of serving immigrants in the suburbs. *Human Service Organizations: Management, Leadership & Governance*, 39(4), 348–361. **https://doi.org/10.1080/23303131.2015.1050143**

Schmid, H., Bar, M., & Nirel, R. (2008). Advocacy activities in nonprofit human service organizations: Implications for policy. *Nonprofit and Voluntary Sector Quarterly*, 37(4), 581–602. **https://doi.org/10.1177/0899764007312666**

Schneider, E., & Marshall, T. J. (2023). *Volunteering in America: New U.S. Census Bureau, AmeriCorps Research*. U.S. Census Bureau. **https://www.census.gov/library/stories/2023/01/volunteering-and-civic-life-in-america.html**

Smith, B. D., Womack, B. G., & Knierim, M. (2017). Political advocacy in the context of "show me your papers": How do human service administrators respond to policy upheaval? J*ournal of Policy Practice*, 16(2), 166–186. **https://doi.org/10.1080/15588742.2016.1214942**

Strolovitch, D. Z. (2006). do interest groups represent the disadvantaged? Advocacy at the intersections of race, class, and gender. *The Journal of Politics*, 68(4), 894–910. **https://doi.org/10.1111/j.1468-2508.2006.00478.x**

Suárez, D. F., & Hwang, H. (2008). Civic engagement and nonprofit lobbying in California, 1998–2003. *Nonprofit and Voluntary Sector Quarterly*, 37(1), 93–112. **https://doi.org/10.1177/0899764007304467**

Trost, J. E. (1986). Statistically nonrepresentative stratified sampling: A sampling technique for qualitative studies. *Qualitative Sociology*, 9(1).

Vu, C. M., Nguyen, D., Tanh, D. B., & Chun, J. (2017). Case study of an ethnic community-based organization in the United States. *Nonprofit and Voluntary Sector Quarterly*, 46(1), 199–217. **https://doi.org/10.1177/0899764016654220**

Weisinger, J. Y., Borges-Méndez, R., & Milofsky, C. (2016). Diversity in the nonprofit and voluntary sector. *Nonprofit and Voluntary Sector Quarterly*, 45(1_suppl), 3S–27S. **https://doi.org/10.1177/0899764015613568**

Żadkowska, M., Dowgiałło, B., Gajewska, M., Herzberg-Kurasz, M., & Kostecka, M. (2022). The sociological confessional: A reflexive process in the transformation from face-to-face to online interview. I*nternational Journal of Qualitative Methods*, 21. **https://doi.org/10.1177/16094069221084785**

Zhang, Z., & Guo, C. (2012). Advocacy by Chinese nonprofit organisations: Towards a responsive government? *Australian Journal of Public Administration*, 71(2), 221–232. **https://doi.org/10.1111/j.1467-8500.2012.00766.x**

Zhang, Z., & Guo, C. (2021). No advocacy without representation? Nonprofit representational mix and nonprofit advocacy. *Nonprofit Management and Leadership*, 32(2), 219–239. **https://doi.org/10.1002/nml.21479**

INDEPENDENT
SECTOR